GOVERNOR'S OFFICE OF PLANNING AND BUDGET

BUDGETTOOL

USER MANUAL

Section III. A – Business Users Guide

Amended FY 2011 and FY 2012

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Preface

The purpose of the BudgetTool User Manual is to provide detailed instructions for using the BudgetTool application. All agencies will use BudgetTool to submit their Amended FY 2011 and FY 2012 budget requests to the Governor's Office of Planning and Budget (OPB). The manual is divided into three sections:

Section I: Orientation – This section contains instructions on:

Technical Requirements
Application Setup
Access
Navigation Overview

It is anticipated that *Section I* will be read first as these instructions are not repeated in the following sections and apply to all users of the application.

Section II: Administrators Guide – This section contains instructions for administrators outside of the OPB IT Department:

OPB Division Administrators – Maintain Agency Administrators and Agency Submitters, as well as their respective OPB Division Users; associate fund sources and object classes to agencies.

Agency Administrators – Maintain Attached Agency Administrators and Agency Users; associate fund sources and object classes to programs.

Section III: Business User's Guide – This section contains detailed instructions on the business processes and how to use the application to develop an agency's budget request, submission by the agency, and workflow through the Governor's Recommendation to the General Assembly.

Section III: OPB Budget Development Guide – This sections contains detailed instructions for the OPB Analysts to be used in developing the OPB Recommendation.

Section IV: OPB IT Administrator's Guide – This section contains the documentation of technical setup of the application, loading data, maintenance of stages, and other various procedures for the OPB IT Division. These tasks are performed by the OPB IT Division, thus this section of the manual will be used internally.

Assuming the functionality of the application does not change, the only section that will need to change from year to year is Section III due to business process changes in budget development.

Section III: Business User's Guide

Purpose

The purpose of this section of the BudgetTool User Manual is to provide instructions for the specific business processes for the current budget cycle as well as instructions of how to use BudgetTool to develop the Amended FY 2011 and FY 2012 agency budgets from Agency Request through the Governor's Recommendation to the General Assembly.

This part of the manual incorporates both business and technical instructions. While it is anticipated that the application will not change dramatically from year to year, only use those business instructions that apply to the budget year being worked on as the business processes more than likely will change from year to year.

III. A: Agency Budget Request

The Agency Request is prepared using the BudgetTool application. Agencies will use descriptors to enter fund source and object class changes by program/subprogram. The AOB or an approved cutoff amendment is selected as the starting point for budget request and changes are made using descriptors. Data will be advanced from the FY2011 cutoff amendment in summary except for the following record detail: Federal Funds, Federal Recovery Funds, Other Funds, Personal Services, and Unique Objects. The same base will be used for both the Amended FY 2011 and FY2012 budgets. The base is advanced from BudgetNet to BudgetTool but State Funds – Prior Year are **not** advanced. OPB analysts will ensure BudgetTool reflects the appropriate base budget for these requests.

NOTE: General Policy Guidelines and Preparation Procedures for Amended FY 2011 and FY2012 budget preparation are posted on the OPB website at http://www.opb.state.ga.us/ .

III.A.1 General Instructions – Amended FY 2011

The Amended FY 2011 Budget requires each agency to identify 4%, 6% and 8% of their FY 2011 appropriation of State General Funds and Tobacco Settlement Funds for reduction. Agencies must set aside GTA-GETS (Georgia Enterprise Technology Services) charges for Georgia Technology Authority (GTA) or exclude these funds from the program budgets prior to calculating the budget reductions. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

The budget submission process in BudgetTool consists of the following components:

1. Adjusted Base Budget (pre-approved by OPB)
2. 4%, 6% and 8% Reductions
3. Redistributions (optional)
4. Workload (designated agencies only)

Adjusted Base Budget

Use the following guide to derive the Adjusted Base Budget:

a. Base Budget (AOB or cut-off amendment)
b. Base Adjustments - consist of the following:
   - Exemptions: items exempted from budget reductions and communicated to agencies by OPB prior to budget submission
   - GTA-GETS charges
   - One-Time - Non-recurring items of expenditure that are considered one time purchases in FY 2011

The Base Budget and sum of the Base Adjustments is the Adjusted Base which agencies will use to calculate the 4%, 6%, and 8% reduction of State General Funds for Amended FY 2011.

State General Funds Reduction

Agencies must reduce 4%, 6% and 8% of the adjusted base budget for State General Funds. This reduction requirement need not apply to every program. Some programs/sub-programs may be unaffected as long as the total amount of the reduction equals 4%, 6% and 8% of the agency's adjusted base for State General Funds. The Department of Education is instructed to submit reduction plans of 2% for the QBE, Equalization and State Schools programs.

Explain the impact of each reduction by program/sub-program. Provide a complete description for all budget reductions and explain the impact on service delivery and performance of the program using the BudgetTool application. To address additional expenditure needs, agencies must identify resources from within the current budget and redistribute funds as needed.

Tobacco Settlement Funds Reduction

In addition to the State General Funds reductions, state agencies with Tobacco Settlement Funds must identify 4%, 6% and 8% of their Amended FY 2011 appropriation for reduction.

Redistribution

Redistribution among *object classes and among sub-programs* within a program should be requested as an amendment to the current budget and should **NOT** be included as part of the agency's Amended FY 2011 budget request. However, requests for redistribution of funds *between programs* must be submitted in BudgetTool as part of the Amended FY 2011 budget request. Agencies are expected to manage their expenditure needs through the flexibility provided in program budgeting. The total of all redistributions and increased funding needs must net to zero**.** Positions and motor vehicles redistributed from one program to another should be reflected in the position and motor vehicle counts for the programs affected.

Workload

Workload consists of enrollment changes only. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

Business Process

The business process sequence for budget development is as follows:

> *Base*: The agency fiscal officer selects the AOB or an approved cutoff amendment as their base, then notifies the OPB Analyst. The base is advanced from BudgetNet to BudgetTool. No State Funds – Prior Year are advanced. This base is fixed and cannot change through the budget development cycle.
> *Base Adjustments:* OPB analysts will identify adjustments for the base. There are two types:
> *One-Time Delete*: Items included in the FY 2011 budget that are one-time occurrences, and therefore, must be removed from this year's request. These are always negative.
> *Exemptions:* Items exempted from budget reductions and communicated to agencies by OPB prior to budget submission.
> *GTA-GETS charges* (where applicable).

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Adjusted Base = the base minus One-Time Deletes, GTA-GETS charges and Exemptions.

4%, 6% and 8% *Reductions*: Agencies must provide scenarios of a net 4%, 6% and 8% reductions to State General Funds and Tobacco Settlement Funds calculated on the **Adjusted Base**. Some programs may have no reduction and some may have more than 4%, 6% or 8% so long as the total for the agency in the percentage scenario shows a 4%, 6% and 8% or more reduction in State General Funds and Tobacco Settlement Funds. The percentage amounts entered can be validated by running reports or by going into 'Update Business Event' and running the 'PreCheck'. The PreCheck is the same process the application runs when an agency submits their budget request. The Department of Education is instructed to submit reduction plans of 2% for the QBE, Equalization, and State Schools programs. The validation for these will be manually performed.

Redistributions: Agencies will use the redistribution change type to fund any enhancements needed by moving the necessary funds from other programs. The sum of all the redirect redistribution for an agency must equal zero by fund source.

Note: With the ability to selectively apply reductions and enhancements to individual programs the result is a reprioritized budget request for State General Funds.

Workload: Workload consists of enrollment changes only. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

Other Adjustments: Adjustments not covered by any of the other change types.

NOTE: BudgetTool validation for the 4%, 6% and 8% reduction plan is not applicable for the Legislative and Judicial Branch agencies.

III.A.1 General Instructions FY 2012

The FY 2012 Budget requires each agency to identify 6%, 8% and 10% of their FY 2011 appropriation of State General Funds and Tobacco Settlement Funds for reduction. Agencies must set aside GTA-GETS charges for Georgia Technology Authority (GTA) or exclude these funds from the program budgets prior to calculating the budget reductions. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

The budget submission process consists of the following components:

1. Adjusted Base Budget (pre-approved by OPB)
2. 6%, 8% and 10% Reduction Plans
3. Redistribution (optional)
4. Workload (specific agencies)
5. Capital Outlay (optional)

Adjusted Base Budget

Use the following guide to derive the Adjusted Base Budget:

a. Base Budget: AOB or approved cut-off amendment

b. Base Adjustments: consisting of the following:
   - Exemptions: items exempted by OPB from budget reductions and communicated to agencies prior to budget submission
   - GTA-GETS charges (where applicable)
   - One time delete: Non-recurring items of expenditure that are considered one-time purchases in FY 2011. These will be provided by OPB

The Base Budget and sum of the Base Adjustments is the Adjusted Base which agencies will use to calculate the 6%, 8% and 10% reductions in State General Funds and Tobacco Settlement Funds for FY 2012.

State General Funds Reduction

Agencies must reduce 6%, 8% and 10% of the total adjusted base budget for state general funds. This reduction requirement need not apply to every program. Some programs/sub-programs may be unaffected as long as the total amount of the reduction equals 6%, 8% and 10% of the agency's adjusted base for State General Funds. The Department of Education is instructed to submit reduction plans of 2% and 4% for QBE, Equalization and State Schools programs.

Explain the impact of each reduction by program/sub-program. Provide a complete description for all budget reductions and explain the impact on service delivery and performance of the program using the BudgetTool application. To address additional expenditure needs, agencies must identify resources from within the current budget and redistribute funds as needed.

Tobacco Funds Reduction

In addition to the State General Funds reductions, state agencies with Tobacco Settlement Fund appropriations must identify 6%, 8% and 10% of their FY 2011 appropriation for reduction.

Redistribution

Redistribution among *object classes and among sub-programs* within a program should be requested as an amendment to the current budget and should **NOT** be included as part of the agency's budget request. As part of the budget request, agencies have the opportunity to shift funds among programs to fund cost increases in other programs or to re-prioritize services. Agencies are encouraged to manage these cost increases in the redistribution plan. The adjusted base budget plus the 6%, 8% and 10% reduction must be the starting point for the redistribution of funds. Agencies are expected to manage their expenditure needs through the flexibility provided in program budgeting. The total of all redistributions and increased funding needs must net to zero**.** Positions and motor vehicles redistributed from one program to another should be reflected in the position and motor vehicle counts for the programs affected.

Workload

Workload consists of enrollment changes only. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

Business Process

The business process sequence for budget development is as follows:

Base: the agency in conjunction with their OPB analyst selects the AOB or an approved cutoff amendment as their base. The base is advanced from BudgetNet to BudgetTool. No **State Funds – Prior Year** are advanced. This base is fixed and cannot change through the budget development cycle. Before entering any changes reports for the cutoff amendment should be run in both BudgetNet and BudgetTool and compared to confirm by program and fund source that the proper amounts were loaded into BudgetTool.

Base Adjustments: OPB analysts will identify and provide a list of adjustments that are to be made to the base. There are two types:

One Time Delete: items included in the FY 2011 budget that are one time occurrences and therefore must be removed from this year's request. The list will be provided by the OPB analyst. These are always negative.

Exemptions: items that are not subject to the reduction guidelines for budget development such as formula driven funding. The list by program will be provided by the OPB analyst to identify those items funded by state general funds that are not subject to the required percentage reduction. These are always negative. (Note: For the Legislative and Judicial branch agencies all state general funds are exempt from the reduction percentage calculation.)

GTA-GETS charges (where applicable).

NOTE: BudgetTool validation for the 6%, 8% and 10% reduction plan is not applicable for the Legislative and Judicial Branch agencies.

Adjusted Base = the base minus One-time Deletes, GTA Outsourcing, and Exemptions.

6%, 8% and 10% *Reductions*: the agencies (except for Legislative and Judicial branch agencies) must provide scenarios of a net 6%, 8% and 10% reductions to State General funds and Tobacco Settlement Funds calculated on the **Adjusted Base** for FY 2012. This is by program although some programs may have no reduction and some may have more than 6%, 8% and 10%, but in total for the agency the percentage scenario must show a 6%, 8% and 10% or more reduction in state general funds and tobacco settlement funds on the adjusted base. The percentage amounts entered can be validated by running reports or by going into 'Update Business Event' and running the 'PreCheck'. The PreCheck is the same process the application runs when an agency submits their budget request. However, the Department of Education is instructed to submit reductions of 2% and 4% for the QBE, Equalization, and State Schools programs. The validation for these will be manually performed.

Redistributions: Agencies will use the redistribution change type to fund any enhancements needed by moving the necessary funds from other programs. The sum of all the redirect redistribution for an agency must equal zero by fund source for the agency.

Note: With the ability to selectively apply reductions and enhancements to individual programs the result is a reprioritized budget request for state general funds.

Workload: consists of enrollment changes only. Budget requests for additional funds or workload increase pertain only to those agencies with enrollment driven programs.

Other Adjustments: will be used to make needed adjustments not covered by any of the other change types.

Note: The screen shots below illustrate the Amended Fiscal Year 2011 input for the 4%, 6%, and 8% percent reductions.

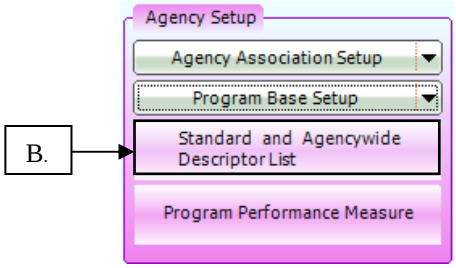
III.A.2 Creating an Agency or Standard Descriptor List

There are three types of descriptors:
Statewide – setup by OPB but can be used by agencies. Primarily these are for changes that will be universal throughout the state regardless of agency or program. However, in some instances OPB may setup statewide descriptors that are agency specific and/or program specific but requires a different percentage or different wording than the descriptor used by all other agencies.
Agencywide – set up by the agency; special security role is needed; can be used by entire agency. These are for changes within an agency that may apply to numerous programs.
Standard – can be setup by agency administrator or agency analyst. These are intended to be used for specific program changes.
Agencywide and Standard descriptors can be set up at one time by the agency administrator before the change entries are done or agency analysts can set up standard descriptors as they make change entries. All descriptors – Statewide, Agencywide, and Standard - can be accessed from a dropdown list when change entries are made.

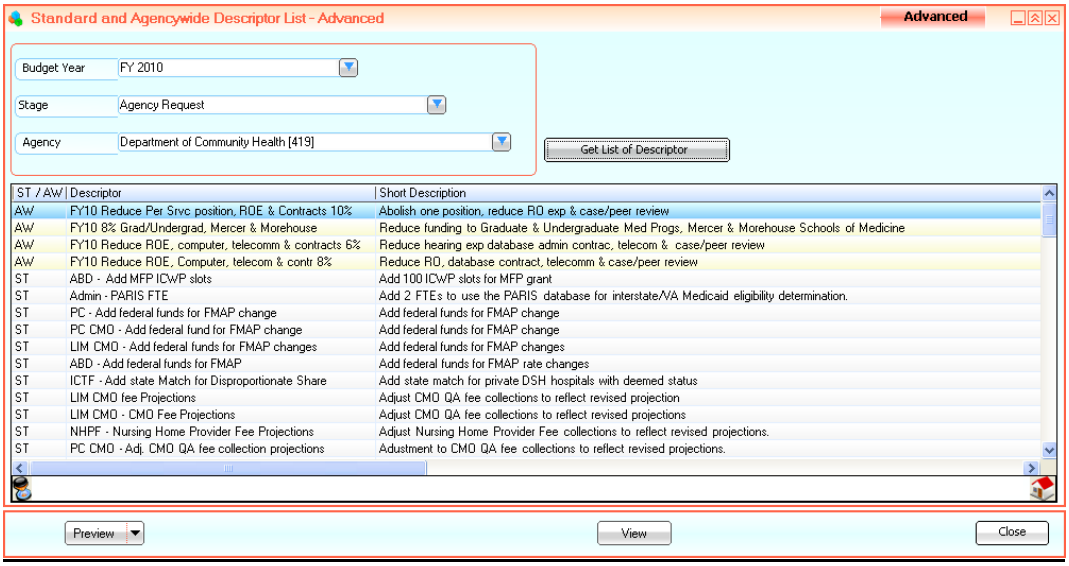
A descriptor is the collection of information about the change that is being requested. It is the key to communicating throughout the entire budget process what is being requested, why, and what effect it will have on customers and deliverables. Therefore, care should be taken to provide as much detail as necessary to enable other users of the information to have a clear understanding of what is being requested. If needed, agencies can attach documents to support a program, object class or fund source change. A descriptor can only be deleted in the stage it was created. In other words an agency request descriptor cannot be deleted in the OPB Recommendation stage or beyond. When a descriptor is deleted all entries for all programs, funds sources, object classes, and counts are also deleted. If you want to delete a change entry for a single program and that is the only place the descriptor is used it is correct to delete the descriptor. However, if the descriptor is used on multiple programs and you delete it trying to delete a specific entry, all entries are deleted. Delete with caution.

A. Click the **Agency Setup** Shield

B. Click Standard and Agencywide Descriptor List

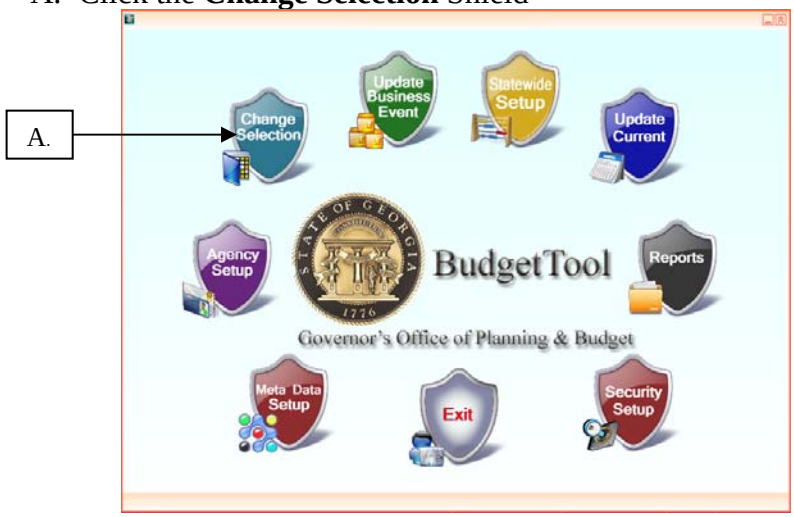


C. Select Budget Year, Stage, and Agency and click Get List of Descriptor
Refer to Section III.A.3.C.2 **Adding a New Descriptor**


Standard and Agencywide Descriptor List - Advanced
Advanced
Budget Year
FY 2010
Stage
Agency Request
Agency
Department of Community Health [419]
Get List of Descriptor
ST / AW | Descriptor | Short Description
AW | FY10 Reduce Per Srvc position, ROE & Contracts 10% | Abolish one position, reduce RO exp & case/peer review
AW | FY10 8% Grad/Undergrad, Mercer & Morehouse | Reduce funding to Graduate & Undergraduate Med Progs, Mercer & Morehouse Schools of Medicine
AW | FY10 Reduce ROE, computer, telecomm & contracts 6% | Reduce hearing exp database admin contrac, telecom & case/peer review
AW | FY10 Reduce ROE, Computer, telecom & contr 8% | Reduce RO, database contract, telecomm & case/peer review
ST | ABD - Add MFP ICWP slots | Add 100 ICWP slots for MFP grant
ST | Admin - PARIS FTE | Add 2 FTEs to use the PARIS database for interstate/VA Medicaid eligibility determination.
ST | PC - Add federal funds for FMAP change | Add federal funds for FMAP change
ST | PC CMO - Add federal fund for FMAP change | Add federal funds for FMAP change
ST | LIM CMO - Add federal funds for FMAP changes | Add federal funds for FMAP changes
ST | ABD - Add federal funds for FMAP | Add federal funds for FMAP rate changes
ST | ICTF - Add state Match for Disproportionate Share | Add state match for private DSH hospitals with deemed status
ST | LIM CMO fee Projections | Adjust CMO QA fee collections to reflect revised projection
ST | LIM CMO - CMO Fee Projections | Adjust CMO QA fee collections to reflect revised projections
ST | NHPF - Nursing Home Provider Fee Projections | Adjust Nursing Home Provider Fee collections to reflect revised projections.
ST | PC CMO - Adj. CMO QA fee collection projections | Adustment to CMO QA fee collections to reflect revised projections.
Preview
View
Close

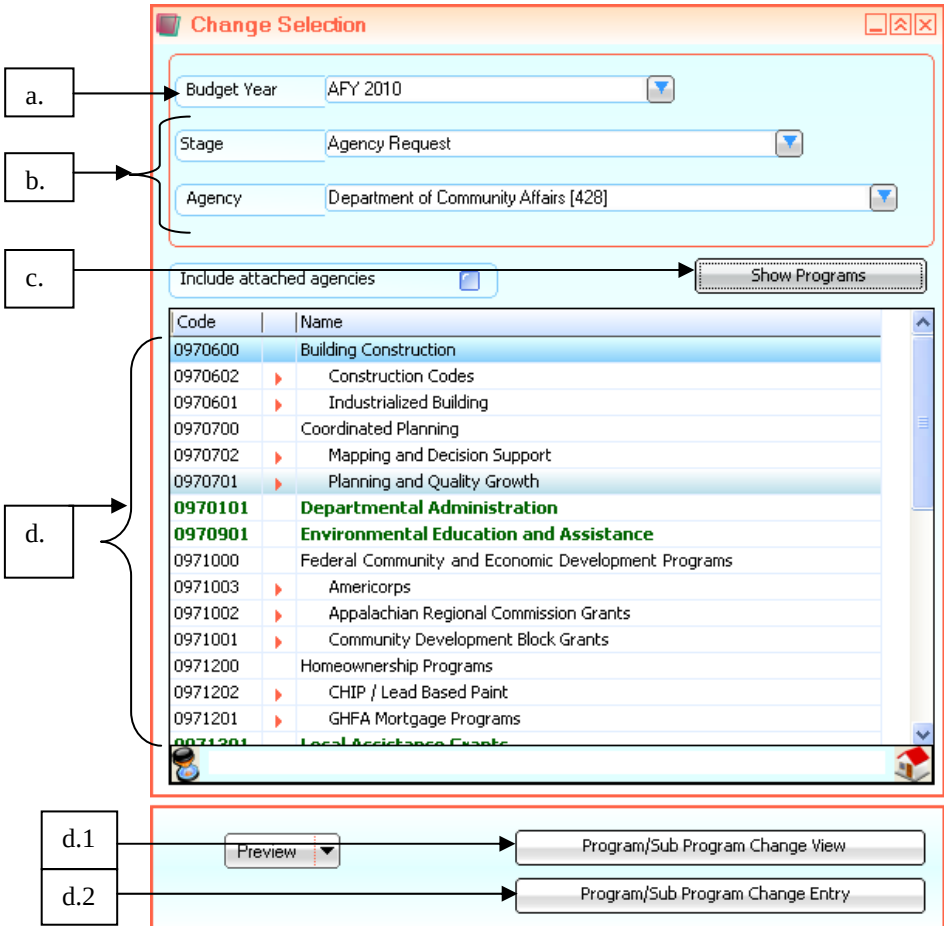
III.A.3 Creating a Change Entry

A. Click the **Change Selection** Shield



B. **Change Selection Screen**

a. Select the **Budget Year** from the drop down box
b. Select the appropriate **Stage** and **Agency** from the drop down box
Click Include attached agencies checkbox if you would like to include attached agencies in the program list.
c. Click Show Programs
d. The program list populates (d.). Double-click the Program or highlight the Program and click the **(d.1) Program/Sub Program Change View** button to view the various entries within their individual categories – Funds, Object Class and Counts. Or highlight the Program and click the **(d.2) Program/Sub Program Change Entry** button at the bottom of the page to open the change entry Summary Screen.



C. Agency Program/Sub Program Change Entry Screen

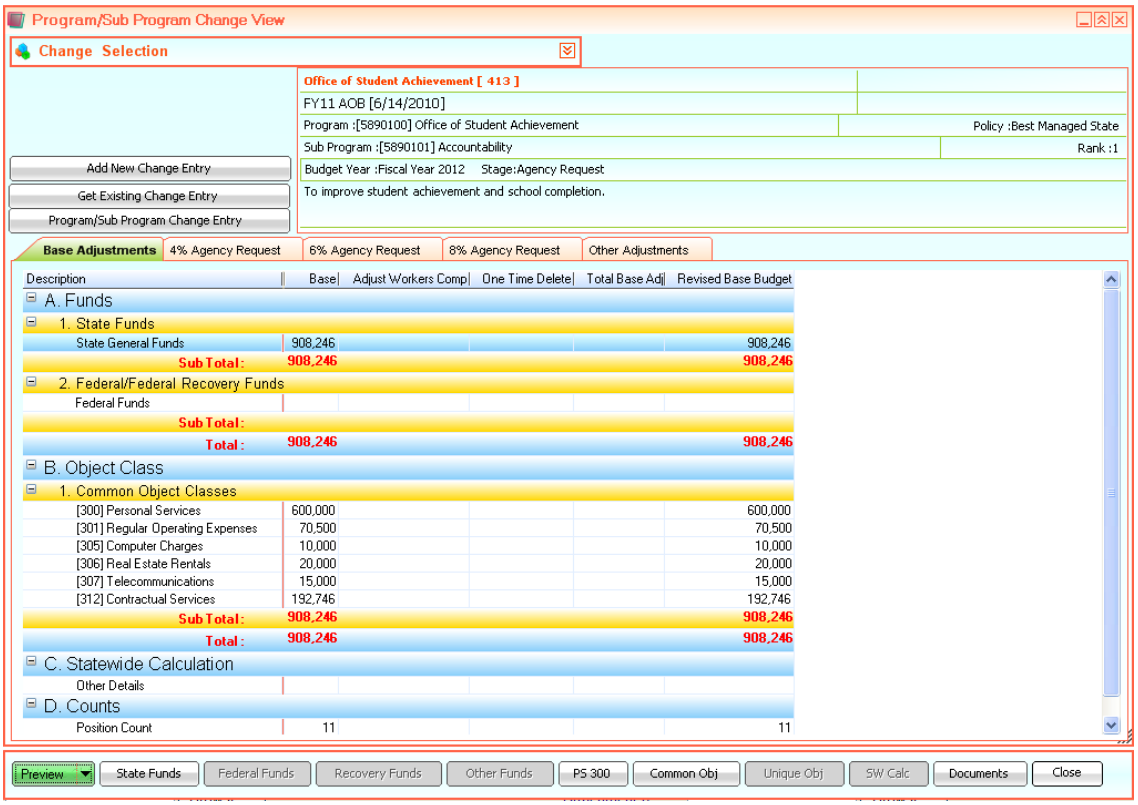
The Change Entry screen gives the user a current view of all program changes entered in total to the Fund Sources and Object Classes side by side as well as changes to Position and Motor Vehicle counts. This screen can be opened for stand alone programs, sub-programs, and parent programs. When opened for a parent program you not be able to make change entries. In addition, the user can click on any of the detail buttons at the bottom of the screen to see the details for:

State Funds, Federal Funds, Federal Recovery Funds, Other Funds, Personal Services (Object Class 300), Common Objects, Unique Objects, and a list of all attached documents. This is a great place to see all changes made to a program.

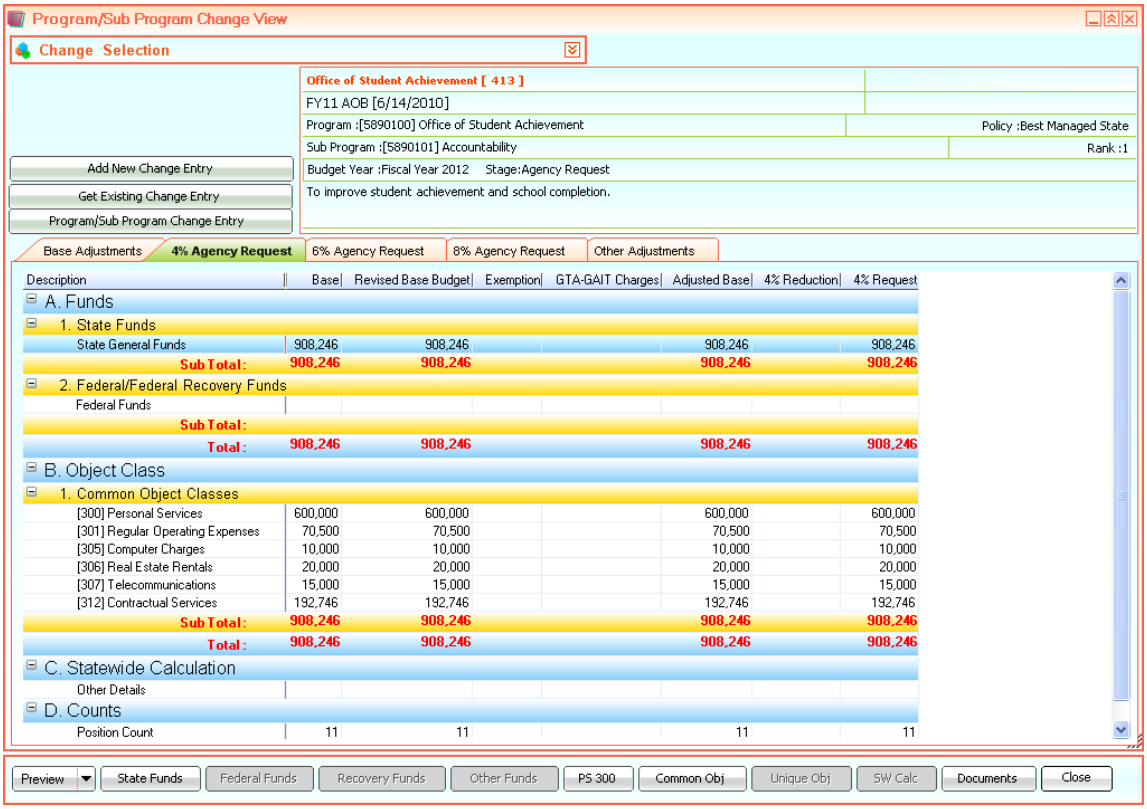
To see changes by change entry type, click on **Program/Sub Program Change View**.

The **Program/Sub Program Change View** screen opens with five tabs (Note: for OPB there is a sixth tab which is Recommendation). The tabs are as follows:

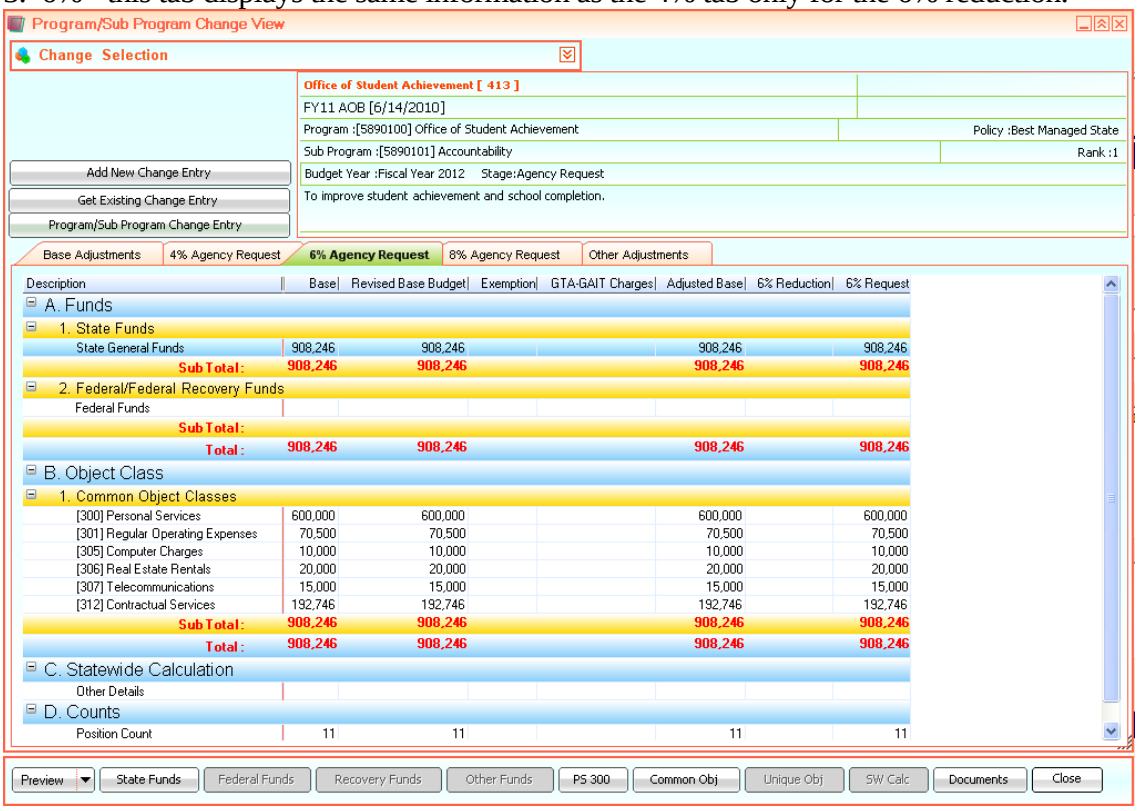
1. Base Adjustments – this tab shows the Base amounts by funds source, object classes and counts. Next all base adjustments are shown. As of this writing for this year the only base adjustment is One Time Deletes. Then the adjustments are totaled and the Revised Base Budget calculated and displayed.


Program/Sub Program Change View
Change Selection
Office of Student Achievement [413]
FY11 AOB [6/14/2010]
Program :[5890100] Office of Student Achievement
Policy :Best Managed State
Sub Program :[5890101] Accountability
Rank :1
Budget Year :Fiscal Year 2012 Stage:Agency Request
To improve student achievement and school completion.
Add New Change Entry
Get Existing Change Entry
Program/Sub Program Change Entry
Base Adjustments
4% Agency Request
6% Agency Request
8% Agency Request
Other Adjustments
Description | Base | Adjust Workers Comp | One Time Delete | Total Base Adj | Revised Base Budget
A. Funds
1. State Funds
State General Funds 908,246 908,246
Sub Total: 908,246 908,246
2. Federal/Federal Recovery Funds
Federal Funds
Sub Total:
Total: 908,246 908,246
B. Object Class
1. Common Object Classes
[300] Personal Services 600,000 600,000
[301] Regular Operating Expenses 70,500 70,500
[305] Computer Charges 10,000 10,000
[306] Real Estate Rentals 20,000 20,000
[307] Telecommunications 15,000 15,000
[312] Contractual Services 192,746 192,746
Sub Total: 908,246 908,246
Total: 908,246 908,246
C. Statewide Calculation
Other Details
D. Counts
Position Count 11 11
Preview
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

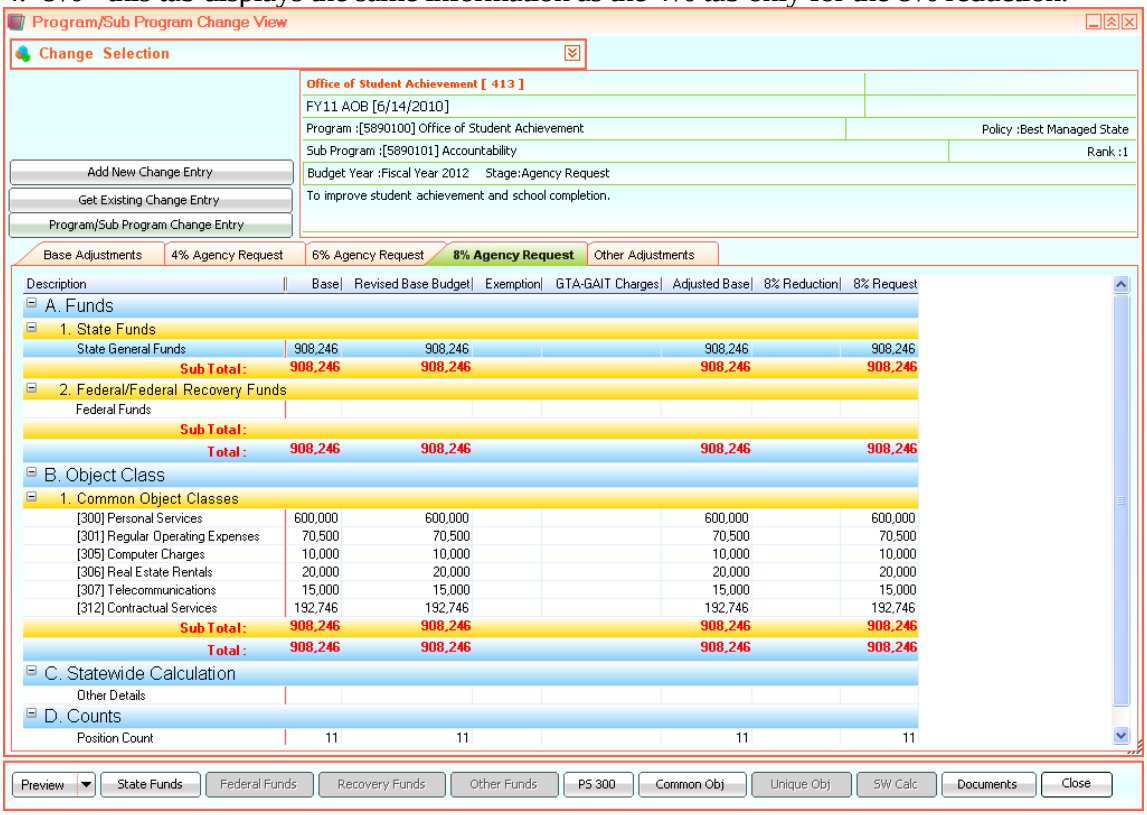
2. 4% - this tab again shows the Base and Revised Base Budget amounts by funds source, object classes and counts. Next any exemptions to which the reduction percentage does not apply are shown. As of this writing for this year Exemptions is the only exclusion. Next the Adjusted Base is calculated, which is the revised base less the exemptions. If 4% reductions have been entered they are shown in the 4% Reduction column and the 4% Request is calculated by subtracting the 4% Reductions from the Adjusted Base.


Program/Sub Program Change View
Change Selection
Office of Student Achievement [413]
FY11 AOB [6/14/2010]
Program :[5890100] Office of Student Achievement
Policy :Best Managed State
Sub Program :[5890101] Accountability
Rank :1
Budget Year :Fiscal Year 2012 Stage:Agency Request
To improve student achievement and school completion.
Add New Change Entry
Get Existing Change Entry
Program/Sub Program Change Entry
Base Adjustments
4% Agency Request
6% Agency Request
8% Agency Request
Other Adjustments
Description | Base | Revised Base Budget | Exemption | GTA-GAIT Charges | Adjusted Base | 4% Reduction | 4% Request
A. Funds
1. State Funds
State General Funds 908,246 908,246 908,246 908,246
Sub Total: 908,246 908,246 908,246 908,246
2. Federal/Federal Recovery Funds
Federal Funds
Sub Total:
Total: 908,246 908,246 908,246 908,246
B. Object Class
1. Common Object Classes
[300] Personal Services 600,000 600,000 600,000 600,000
[301] Regular Operating Expenses 70,500 70,500 70,500 70,500
[305] Computer Charges 10,000 10,000 10,000 10,000
[306] Real Estate Rentals 20,000 20,000 20,000 20,000
[307] Telecommunications 15,000 15,000 15,000 15,000
[312] Contractual Services 192,746 192,746 192,746 192,746
Sub Total: 908,246 908,246 908,246 908,246
Total: 908,246 908,246 908,246 908,246
C. Statewide Calculation
Other Details
D. Counts
Position Count 11 11 11 11
Preview
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

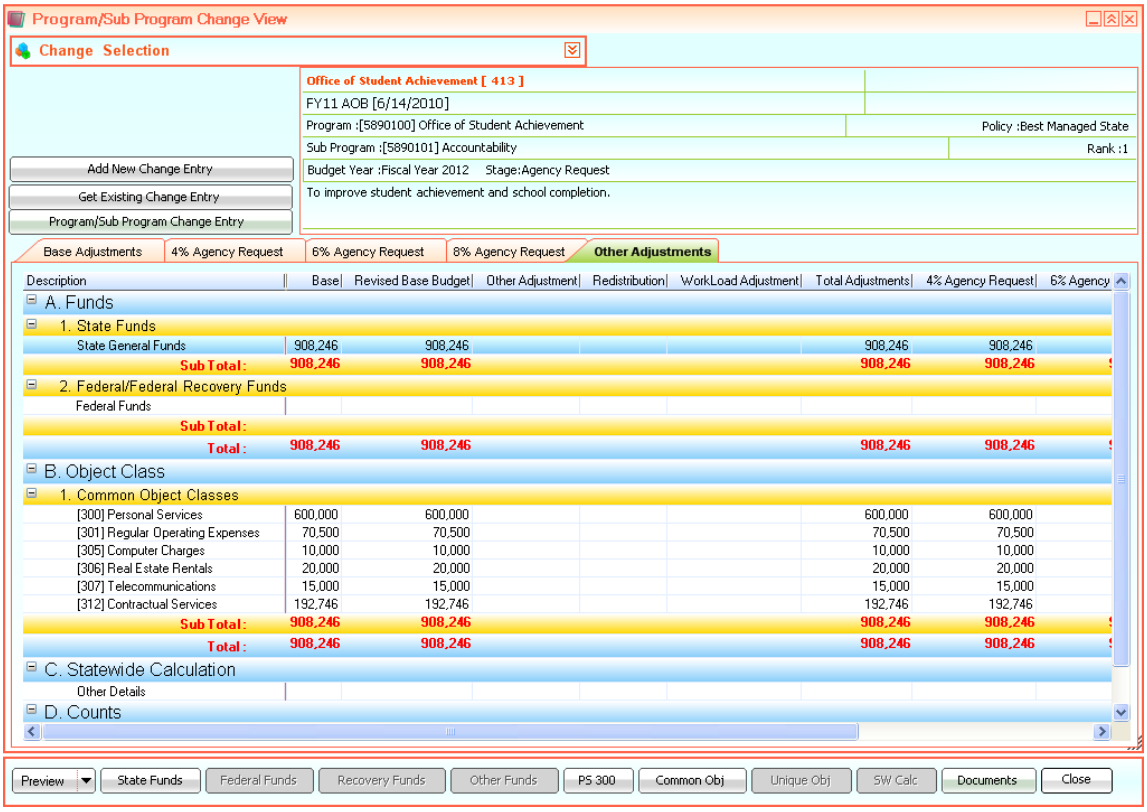
3. 6% - this tab displays the same information as the 4% tab only for the 6% reduction.



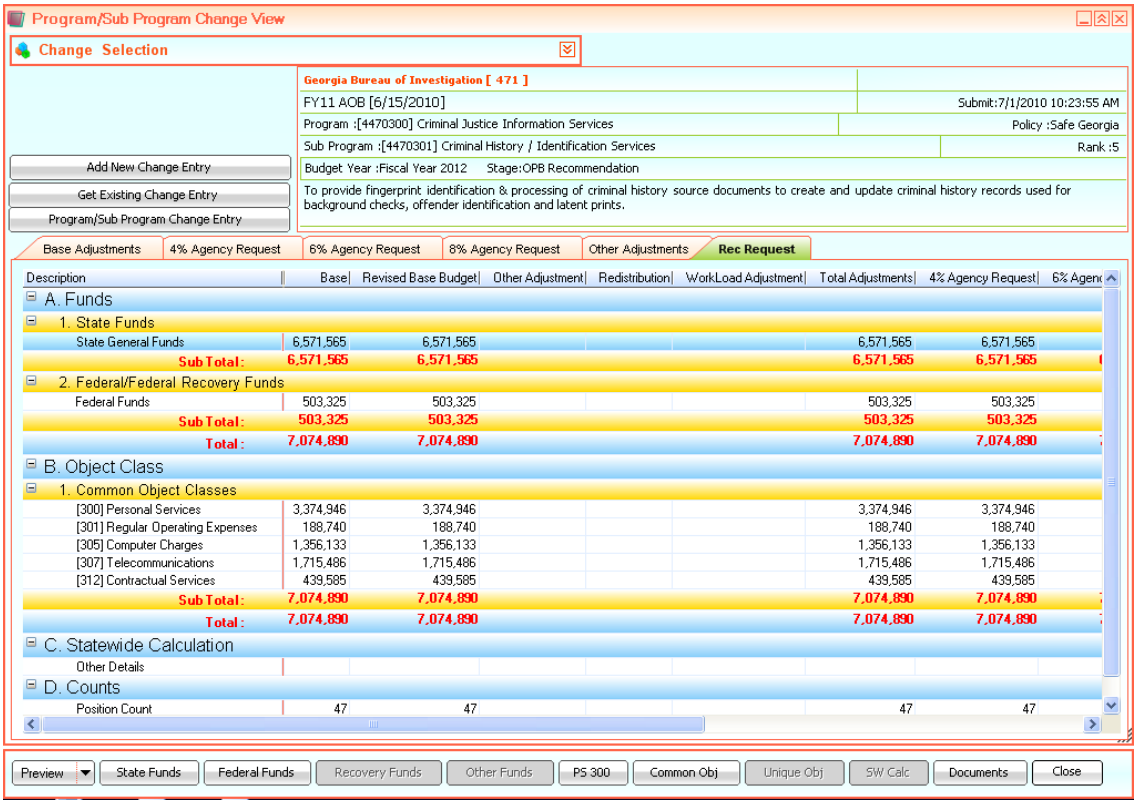
4. 8% - this tab displays the same information as the 4% tab only for the 8% reduction.



5. Other Adjustments - this tab shows the Base and Revised Base amounts by funds source, object classes and counts. Next any change types classified as Other Adjustments are shown. These are currently Redistribution, Workload, and Other change types. The Total Adjustments column is calculated as the Revised Base plus or minus the all the Other Adjustments. Next the 4%, 6%, and 8% reductions are subtracted from the Total Adjustments column to derive the Agency Request for 4%, 6%, and 8% reductions.

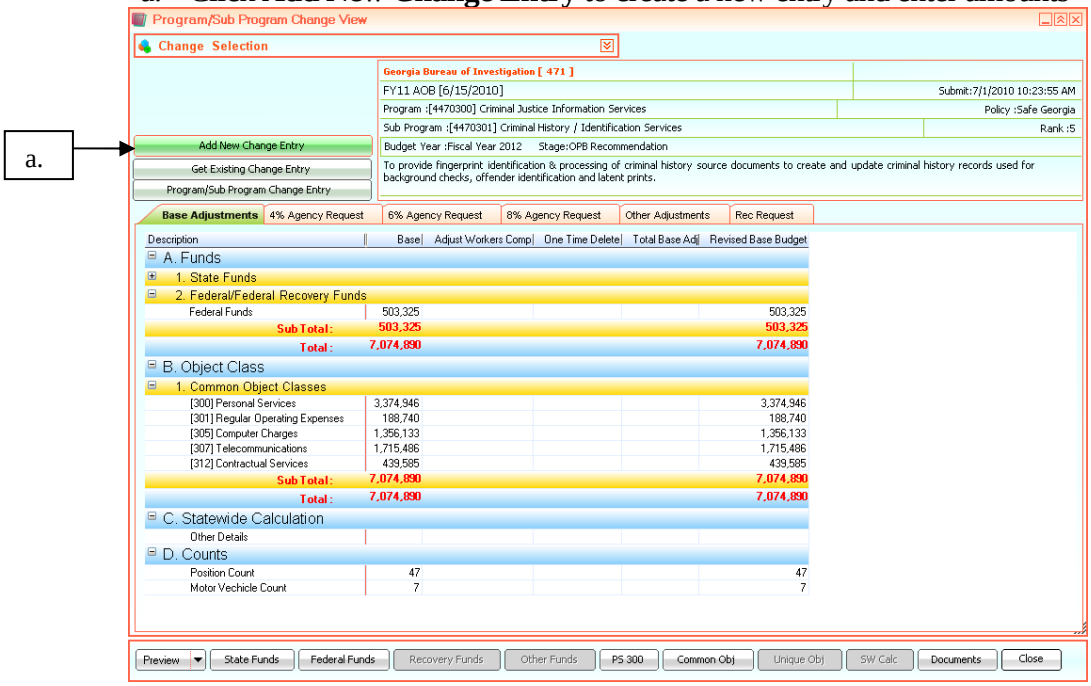

Program/Sub Program Change View
Change Selection
Office of Student Achievement [413]
FY11 AOB [6/14/2010]
Program :[5890100] Office of Student Achievement
Policy :Best Managed State
Sub Program :[5890101] Accountability
Rank :1
Budget Year :Fiscal Year 2012 Stage:Agency Request
To improve student achievement and school completion.
Add New Change Entry
Get Existing Change Entry
Program/Sub Program Change Entry
Base Adjustments
4% Agency Request
6% Agency Request
8% Agency Request
Other Adjustments
Description | Base | Revised Base Budget | Other Adjustment | Redistribution | WorkLoad Adjustment | Total Adjustments | 4% Agency Request | 6% Agency
A. Funds
1. State Funds
State General Funds 908,246 908,246 908,246 908,246
Sub Total: 908,246 908,246 908,246 908,246
2. Federal/Federal Recovery Funds
Federal Funds
Sub Total:
Total: 908,246 908,246 908,246 908,246
B. Object Class
1. Common Object Classes
[300] Personal Services 600,000 600,000 600,000 600,000
[301] Regular Operating Expenses 70,500 70,500 70,500 70,500
[305] Computer Charges 10,000 10,000 10,000 10,000
[306] Real Estate Rentals 20,000 20,000 20,000 20,000
[307] Telecommunications 15,000 15,000 15,000 15,000
[312] Contractual Services 192,746 192,746 192,746 192,746
Sub Total: 908,246 908,246 908,246 908,246
Total: 908,246 908,246 908,246 908,246
C. Statewide Calculation
Other Details
D. Counts
Preview
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

6. Rec Request – this is a tab available from the OPB Recommendation stage and beyond. This screen has the same information as the Other Adjustments tab with an extra column for the selected recommendation (4%, 6%, 8% or none). For a single program this is the 4, 6, 8% reduction or none but for a parent program with multiple sub-programs it can be a combination of any, all, or none of the reductions.

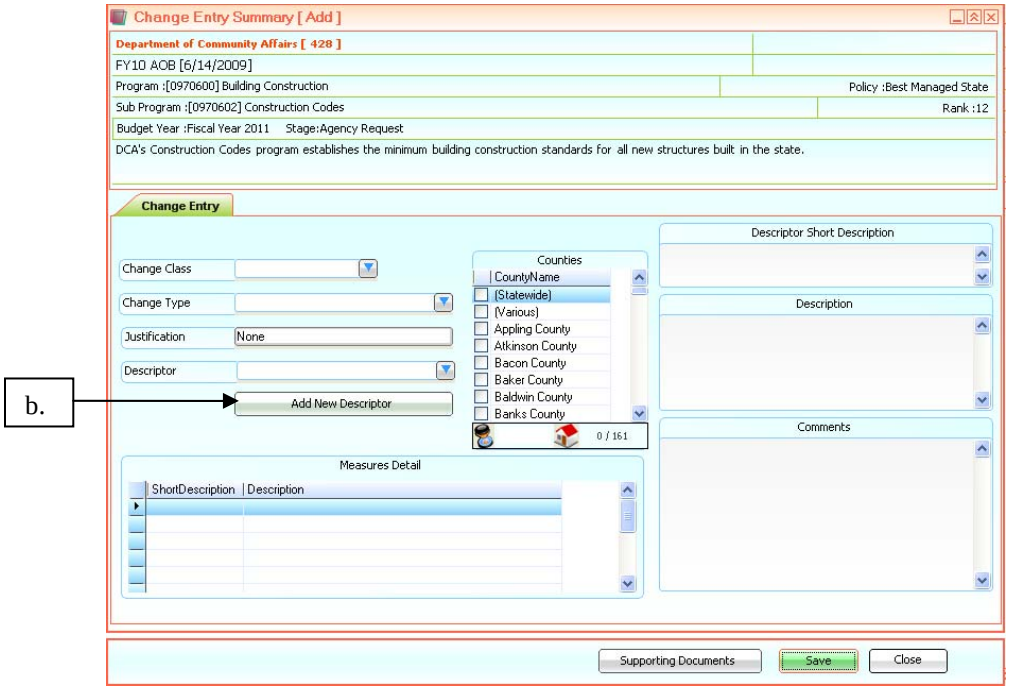

Program/Sub Program Change View
Change Selection
Georgia Bureau of Investigation [471]
FY11 AOB [6/15/2010]
Submit:7/1/2010 10:23:55 AM
Program :[4470300] Criminal Justice Information Services
Policy :Safe Georgia
Sub Program :[4470301] Criminal History / Identification Services
Rank :5
Budget Year :Fiscal Year 2012 Stage:OPB Recommendation
To provide fingerprint identification & processing of criminal history source documents to create and update criminal history records used for background checks, offender identification and latent prints.
Add New Change Entry
Get Existing Change Entry
Program/Sub Program Change Entry
Base Adjustments
4% Agency Request
6% Agency Request
8% Agency Request
Other Adjustments
Rec Request
Description
Base
Revised Base Budget
Other Adjustment
Redistribution
WorkLoad Adjustment
Total Adjustments
4% Agency Request
A. Funds
1. State Funds
State General Funds 6,571,565 6,571,565 6,571,565 6,571,565
Sub Total: 6,571,565 6,571,565 6,571,565 6,571,565
2. Federal/Federal Recovery Funds
Federal Funds 503,325 503,325 503,325 503,325
Sub Total: 503,325 503,325 503,325 503,325
Total: 7,074,890 7,074,890 7,074,890 7,074,890
B. Object Class
1. Common Object Classes
[300] Personal Services 3,374,946 3,374,946 3,374,946 3,374,946
[301] Regular Operating Expenses 188,740 188,740 188,740 188,740
[305] Computer Charges 1,356,133 1,356,133 1,356,133 1,356,133
[307] Telecommunications 1,715,486 1,715,486 1,715,486 1,715,486
[312] Contractual Services 439,585 439,585 439,585 439,585
Sub Total: 7,074,890 7,074,890 7,074,890 7,074,890
Total: 7,074,890 7,074,890 7,074,890 7,074,890
C. Statewide Calculation
Other Details
D. Counts
Position Count 47 47 47 47
Preview
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

Changes are entered in BudgetTool very much like they were last year. The screens have been somewhat modified and in some cases more data is requested.

1) Adding a New Change Entry for the selected program
   a. Click **Add New Change Entry** to create a new entry and enter amounts



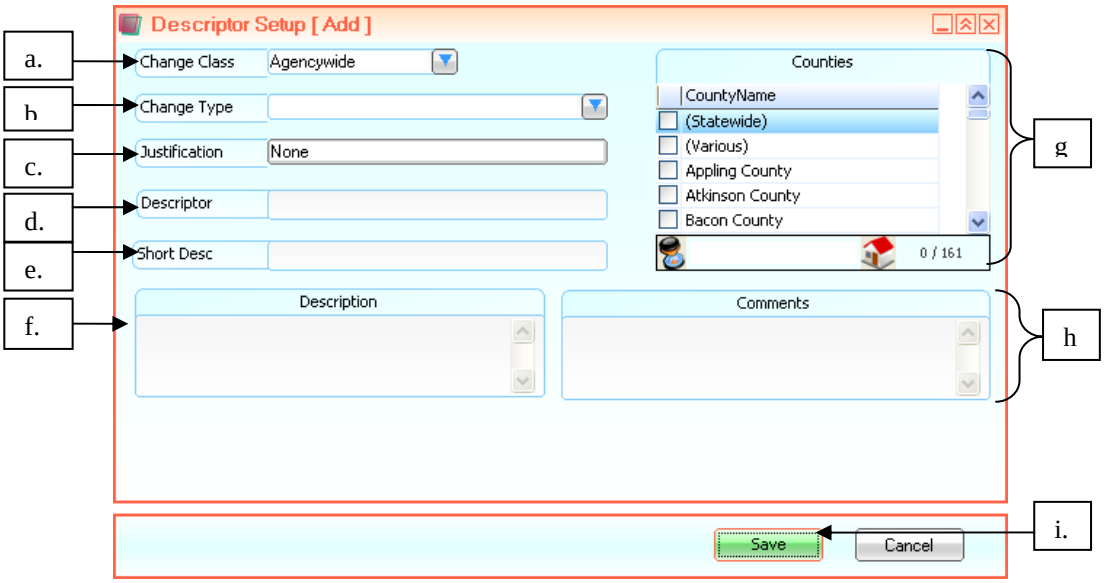
b. Change Entry Summary [Add] Screen



A descriptor is required when a change entry is needed. If you have previously created a descriptor for this agency it will appear in the descriptor drop down box. A new descriptor can be created by clicking the **Add New Descriptor** button.

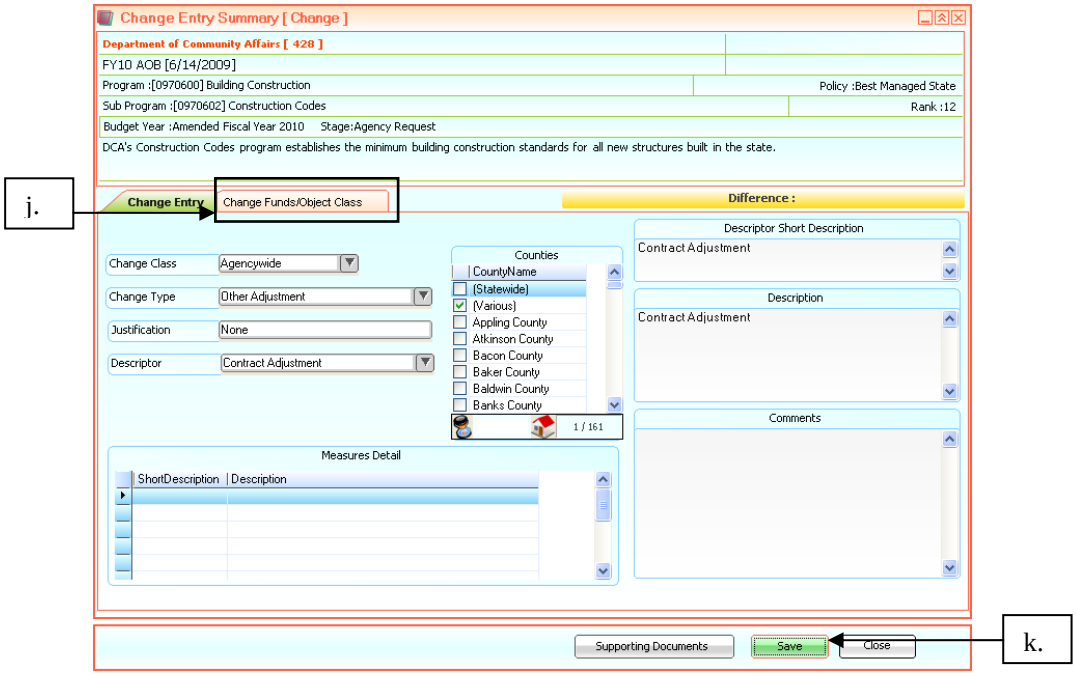
2) Adding a New Descriptor
   a. (Required) Choose the Change Class - Agency Wide or Standard
      Note: Statewide descriptors are created by OPB. Do not create agencywide or standard descriptors for change types assigned to the Statewide change class.
      Agency Wide: This descriptor is created by the agency and will be effective for the entire agency
      Standard: is created by a specific analyst for use on one or several programs or sub programs.
   b. (Required) Choose the Change Type from the drop down menu
      1. 4% Reduction
      2. 6% Reduction
      3. 8% Reduction
      4. Exemptions
      5. GTA-GETS Charges
      6. One Time Delete
      7. Other Adjustment
      8. Redistribution
      9. Workload Adjustment
   c. Justification – is not used in the agency request (defaults to 'none'). It is reserved for use in the OPB Recommendation stage and beyond for further grouping descriptors.

d. (Required) Type in the Descriptor name (50 characters max)
e. (Required) Type in a Short Description explaining the request (250 characters max)
f. In the larger Description box give a more detailed explanation of the request and the reason for the request if needed (500 characters max)
g. (Required) Choose the Counties which will be affected by the request
   1. Statewide: The request will affect every county in the state
   2. Various: Only some counties will be affected by the request
   3. Choose the affected counties individually
h. Comments. Use this section to add any additional comments about the Descriptor or the setup (4,000 characters max)
i. Click Save to return to the **Change Entry Summary [Change]** Screen



You have now entered the descriptor but it is not yet linked to the program. The next steps accomplish this.

j. Click the Change Funds/Object Class Tab
k. Click Save



3) Change Entries

a. Input the change amount into Fund Summary and Object Class Summary change sections. Also input any changes to Position and Motor vehicle counts this change requires.

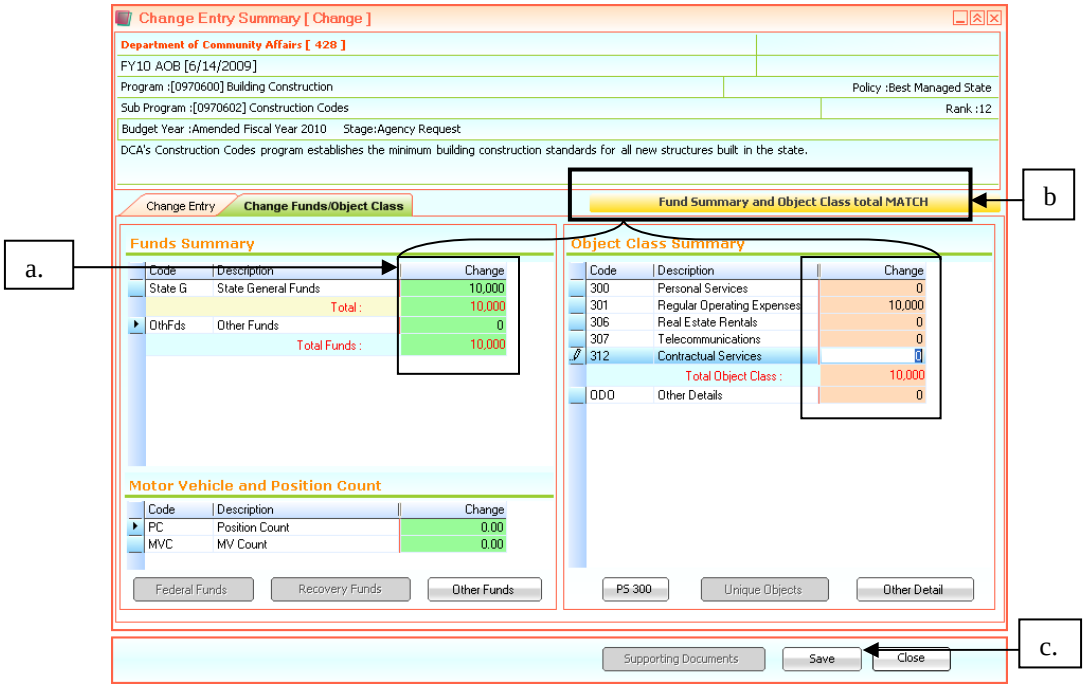
The Funds Summary must equal the Object Class Summary

In the example shown below $10,000 was input as the change amount for State General Funds and $10,000 was input as Regular Operating Expenses

b. This box alerts the user if they are still out of balance

NOTE: Tab out of field for the screen to refresh and check the data

c. Click in the Fund Summary section to update the page then click **Save**



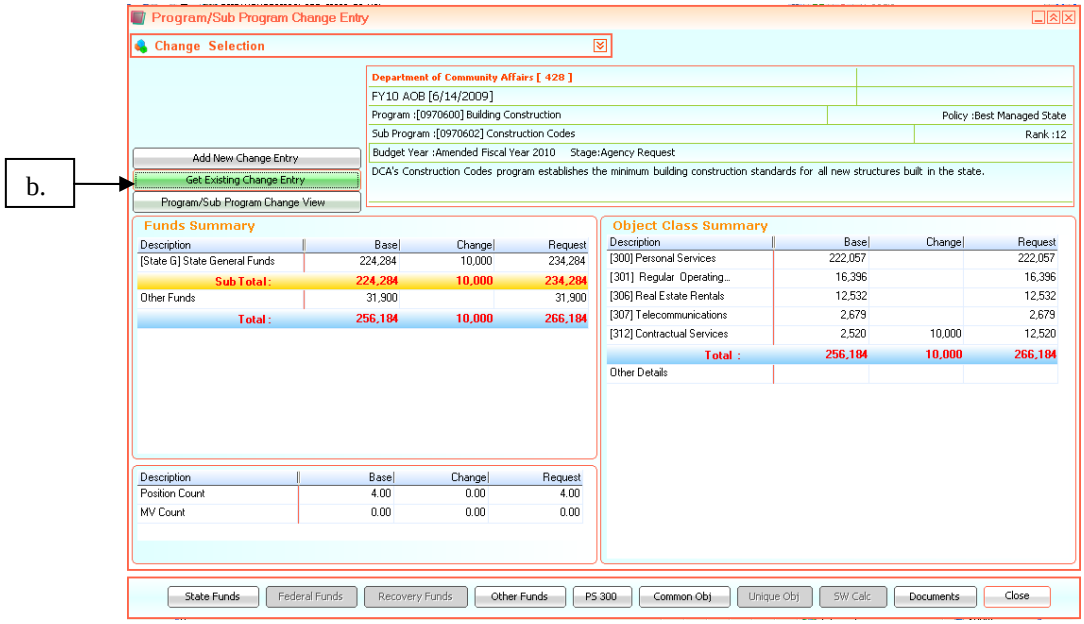
Note: Depending on the agency and program the following buttons *may* be active at the bottom of the window – Federal Funds, Recovery Funds, Other Funds, PS 300, and Unique Objects. These buttons are used to enter the details supporting the summary level entries on the Change Entry Summary (Change) screen.

The PS 300 detail requirement. The base detail is loaded from the cutoff amendment. Any changes entered to Object Class 300 – Personal Services also need to have supporting detail entered. The detail items that are loaded are specific to an agency and program. The following is an example of the detail items that could appear:

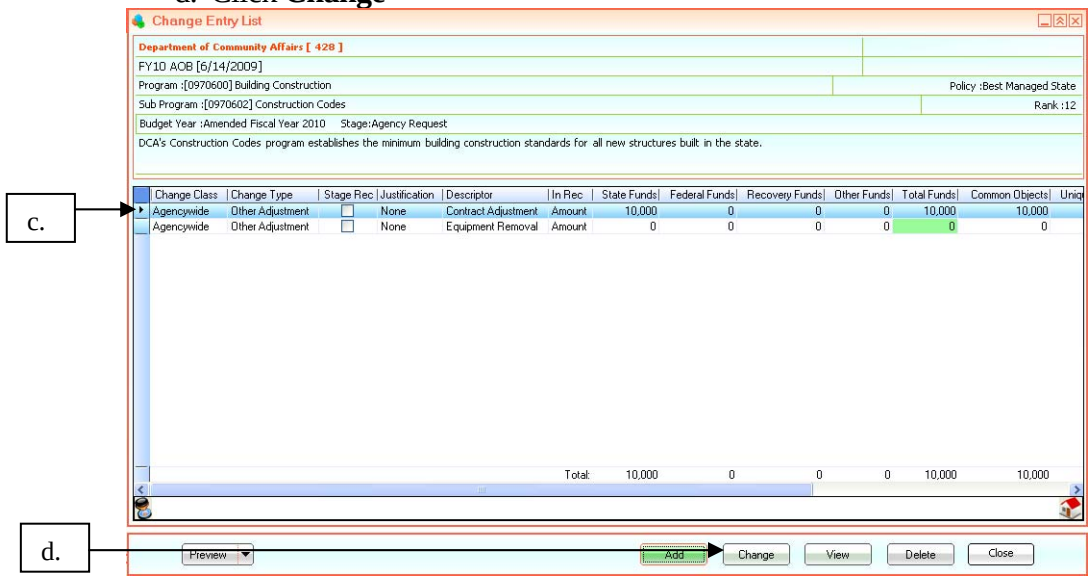
> Regular Salaries, FICA, ERS or TRS, Health Insurance, Unemployment, Merit System Assessments, Lapse Factor, Personal Liability, Pay for Performance, Workers Compensation, Overtime, Temporary/Casual Labor

The detail must add to the summary entry for Object Class 300 – Personal Services.

4) Editing Existing Changes
   a. The Agency Program/Sub Program Change Entry screen now shows the updated change amounts

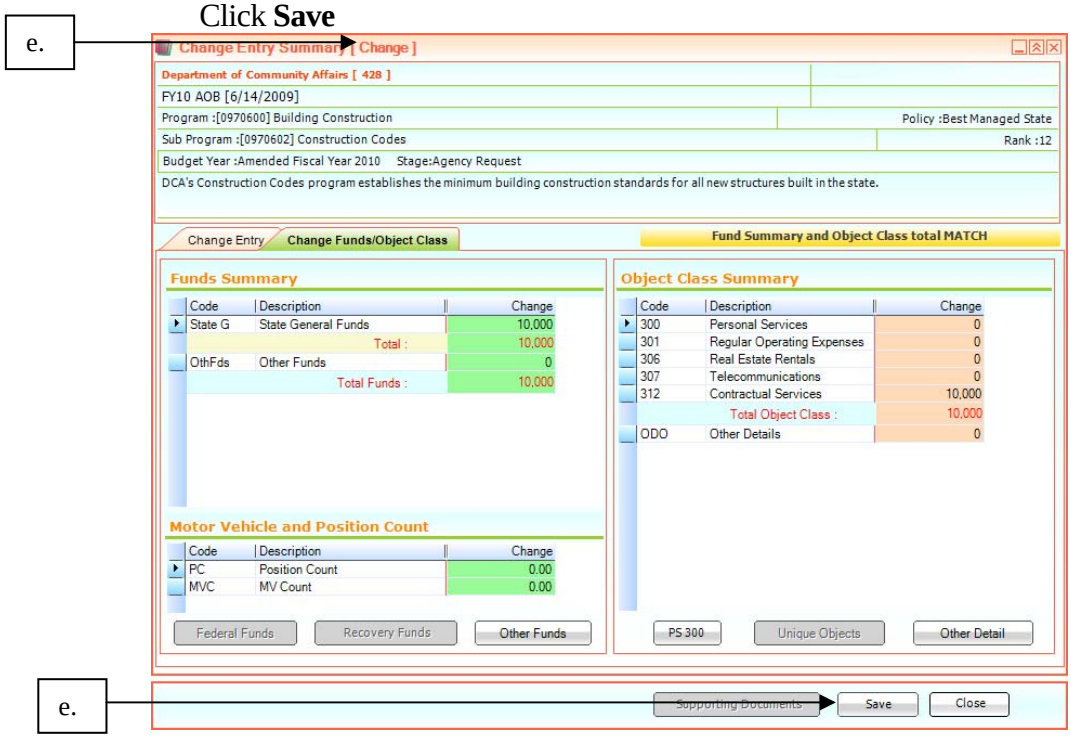

b.
Program/Sub Program Change Entry
Change Selection
Department of Community Affairs [428]
FY10 AOB [6/14/2009]
Program :[0970600] Building Construction
Policy :Best Managed State
Sub Program :[0970602] Construction Codes
Rank :12
Budget Year :Amended Fiscal Year 2010 Stage:Agency Request
DCA's Construction Codes program establishes the minimum building construction standards for all new structures built in the state.
Add New Change Entry
Get Existing Change Entry
Program/Sub Program Change View
Funds Summary
Description Base Change Request
[State G] State General Funds 224,284 10,000 234,284
Sub Total : 224,284 10,000 234,284
Other Funds 31,900 31,900
Total : 256,184 10,000 266,184
Object Class Summary
Description Base Change Request
[300] Personal Services 222,057 222,057
[301] Regular Operating... 16,396 16,396
[306] Real Estate Rentals 12,532 12,532
[307] Telecommunications 2,679 2,679
[312] Contractual Services 2,520 10,000 12,520
Total : 256,184 10,000 266,184
Other Details
Description Base Change Request
Position Count 4.00 0.00 4.00
MV Count 0.00 0.00 0.00
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

b. Click the **Get Existing Change Entry** to view, edit, or delete the existing entries. New change entries can also be added using this screen.
c. Click the entry you would like to edit
d. Click **Change**


c.
d.
Change Entry List
Department of Community Affairs [428]
FY10 AOB [6/14/2009]
Program :[0970600] Building Construction
Policy :Best Managed State
Sub Program :[0970602] Construction Codes
Rank :12
Budget Year :Amended Fiscal Year 2010 Stage:Agency Request
DCA's Construction Codes program establishes the minimum building construction standards for all new structures built in the state.
Change Class Change Type Stage Rec Justification Descriptor In Rec State Funds Federal Funds Recovery Funds Other Funds Total Funds Common Objects
Agencywide Other Adjustment None Contract Adjustment Amount 10,000 0 0 0 10,000 10,000
Agencywide Other Adjustment None Equipment Removal Amount 0 0 0 0 0 0
Total: 10,000 0 0 0 10,000 10,000
Preview
Add
Change
View
Delete
Close

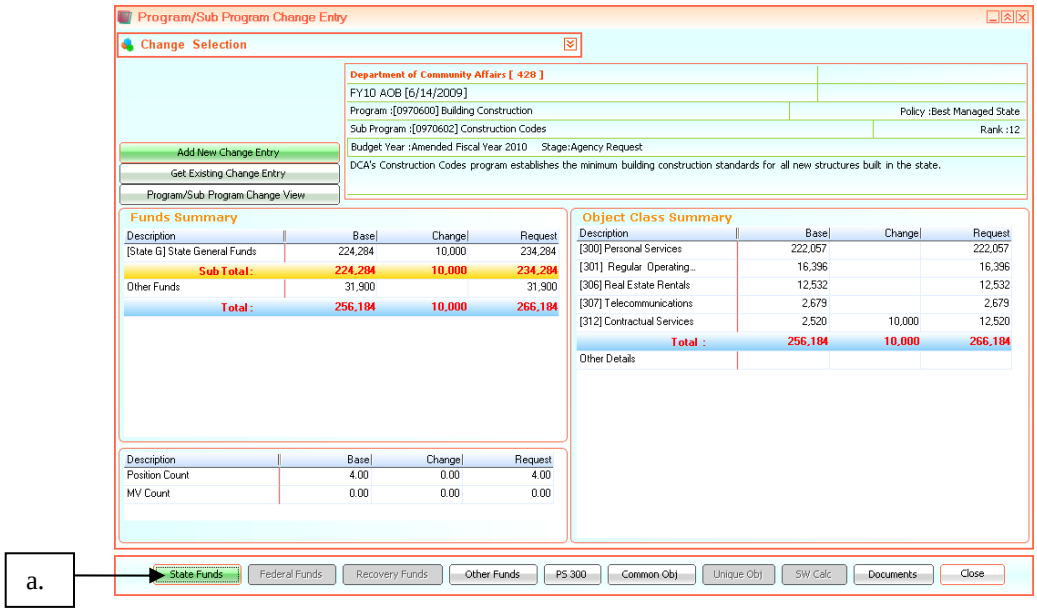
e. The Change Entry Summary will now indicate [Change] to show a change is being made

f. Click **Change Funds/Object Class** and make the change entries necessary and Click **Save**

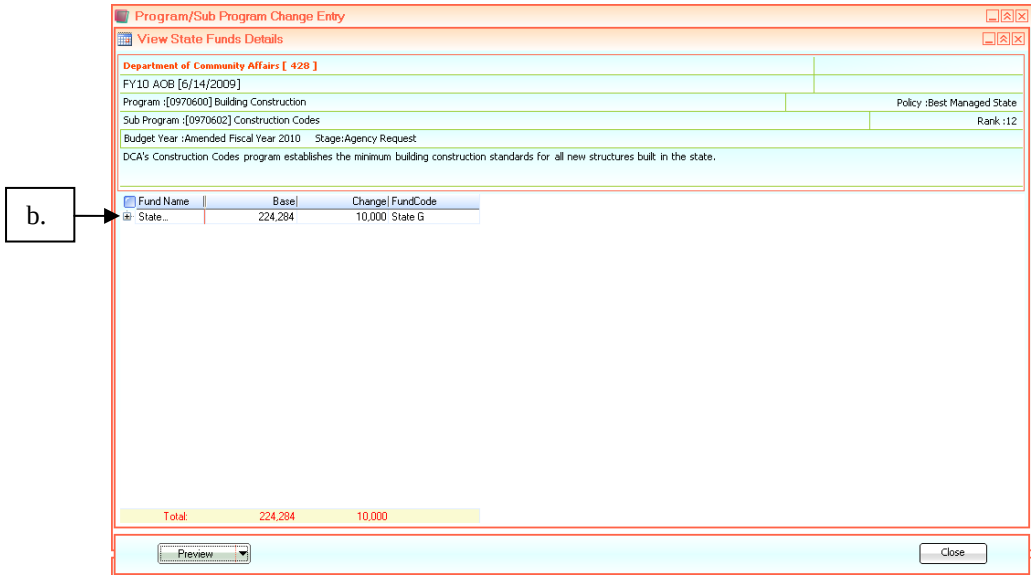


5) Detail Views

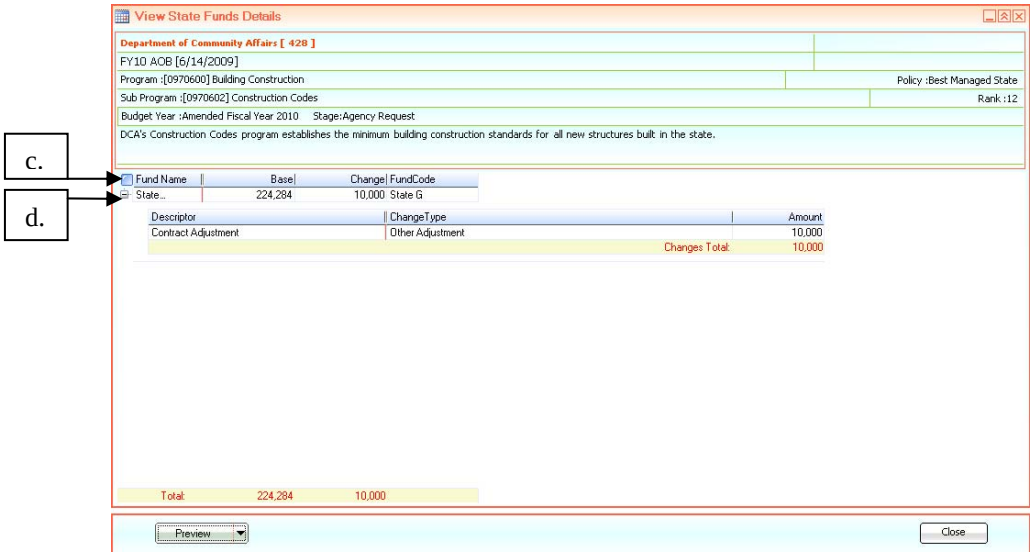
a. Click State Funds



b. The **View State Funds Details** screen is a detailed view by descriptor of changes to all state funds for that program.

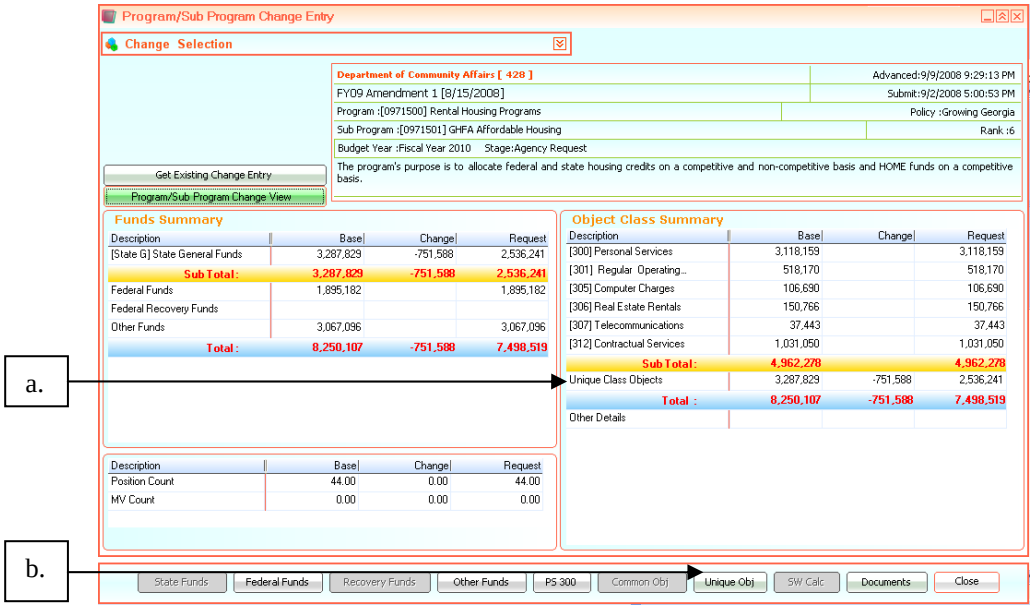


c. Clicking the **Fund Name** box expands all the detail lists at once
d. Click the blue triangle to get a more detailed view of an individual fund line for instance
State General Funds



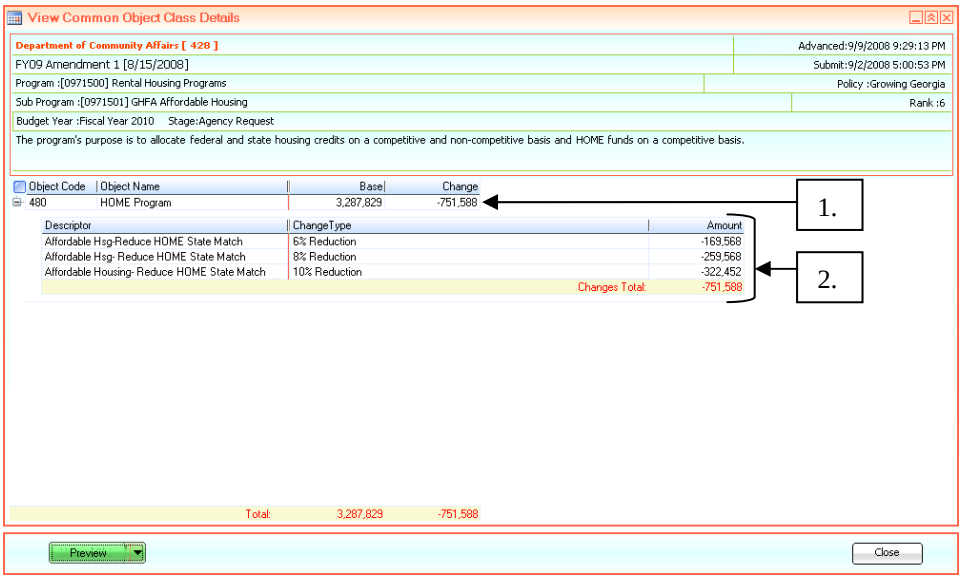
More detail views can also be seen by clicking on the other buttons at the bottom of the Agency Program/Sub program Change Entry screen – Federal Funds, Recovery funds, Other Funds, PS 300, Common Object Class, Unique Object Class.
In addition, by clicking the **Documents** button you can see and access a list of documents that have been attached for this program.

6) Editing Unique Objects
   a. Click the amount space in the change column to edit the amount
   b. Click the **Unique Objects** button


Program/Sub Program Change Entry
Change Selection
Department of Community Affairs [428]
Advanced:9/9/2008 9:29:13 PM
FY09 Amendment 1 [8/15/2008]
Submit:9/2/2008 5:00:53 PM
Program :[0971500] Rental Housing Programs
Policy :Growing Georgia
Sub Program :[0971501] GHFA Affordable Housing
Rank :6
Budget Year :Fiscal Year 2010 Stage:Agency Request
The program's purpose is to allocate federal and state housing credits on a competitive and non-competitive basis and HOME funds on a competitive basis.
Get Existing Change Entry
Program/Sub Program Change View
Funds Summary
Description Base Change Request
[State G] State General Funds 3,287,829 -751,588 2,536,241
Sub Total: 3,287,829 -751,588 2,536,241
Federal Funds 1,895,182 1,895,182
Federal Recovery Funds
Other Funds 3,067,096 3,067,096
Total : 8,250,107 -751,588 7,498,519
Object Class Summary
Description Base Change Request
[300] Personal Services 3,118,159 3,118,159
[301] Regular Operating... 518,170 518,170
[305] Computer Charges 106,690 106,690
[306] Real Estate Rentals 150,766 150,766
[307] Telecommunications 37,443 37,443
[312] Contractual Services 1,031,050 1,031,050
Sub Total: 4,962,278 4,962,278
Unique Class Objects 3,287,829 -751,588 2,536,241
Total : 8,250,107 -751,588 7,498,519
Other Details
Description Base Change Request
Position Count 44.00 0.00 44.00
MV Count 0.00 0.00 0.00
a.
b.
State Funds
Federal Funds
Recovery Funds
Other Funds
PS 300
Common Obj
Unique Obj
SW Calc
Documents
Close

c. Change Entry Unique Object Class Details Screen

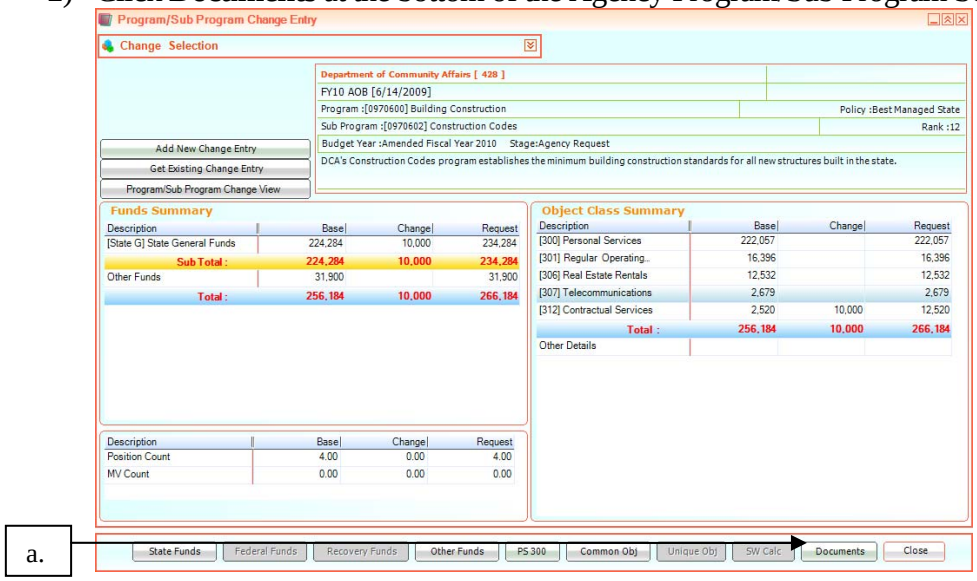
1. Click the Amount and type in the Change amount used on the previous page
2. This amount can be further summarized by tabbing in each line and adding an additional row


View Common Object Class Details
Department of Community Affairs [428]
Advanced:9/9/2008 9:29:13 PM
FY09 Amendment 1 [8/15/2008]
Submit:9/2/2008 5:00:53 PM
Program :[0971500] Rental Housing Programs
Policy :Growing Georgia
Sub Program :[0971501] GHFA Affordable Housing
Rank :6
Budget Year :Fiscal Year 2010 Stage:Agency Request
The program's purpose is to allocate federal and state housing credits on a competitive and non-competitive basis and HOME funds on a competitive basis.
Object Code Object Name Base Change
480 HOME Program 3,287,829 -751,588
Descriptor ChangeType Amount
Affordable Hsg-Reduce HOME State Match 6% Reduction -169,568
Affordable Hsg- Reduce HOME State Match 8% Reduction -259,568
Affordable Housing- Reduce HOME State Match 10% Reduction -322,452
Changes Total: -751,588
1.
2.
Total: 3,287,829 -751,588
Preview
Close

Supporting Documents

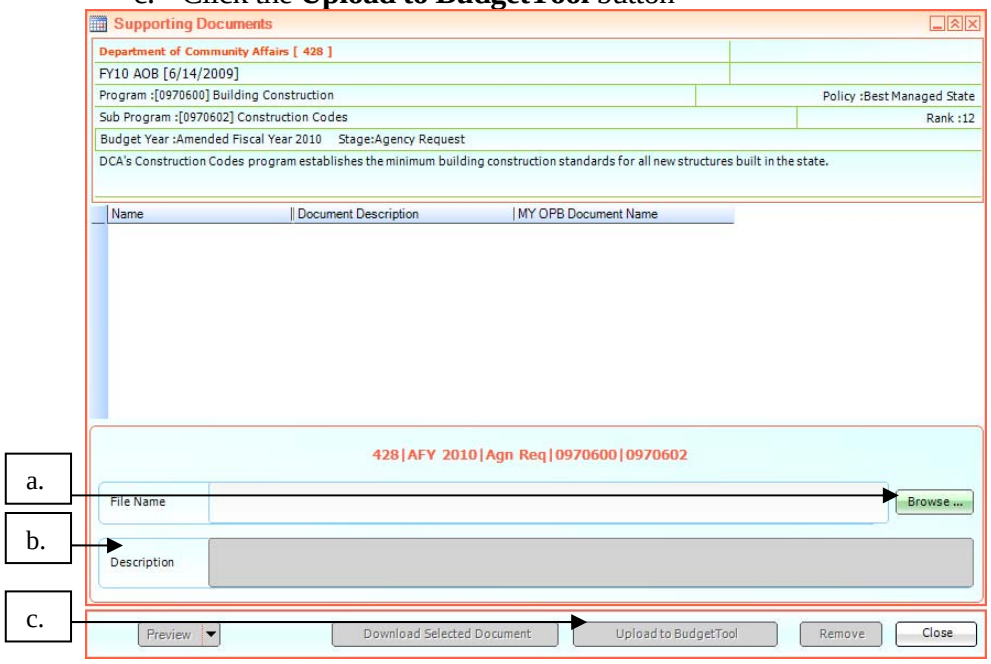
A. Attaching Supporting Documents

1) Click the **Change Selection** Shield and make your selections. Once the program list loads, either highlight a program and click on the 'Change View' or 'Change Entry' button or double click the program.
2) Click **Documents** at the bottom of the Agency Program/Sub Program Screen

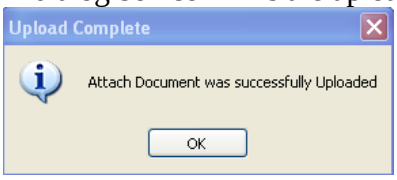


3) **Supporting Documents** Screen
   a. Click the **Browse** button to locate the file you would like to upload
   b. Tab to **description** and type in a description of the file being uploaded

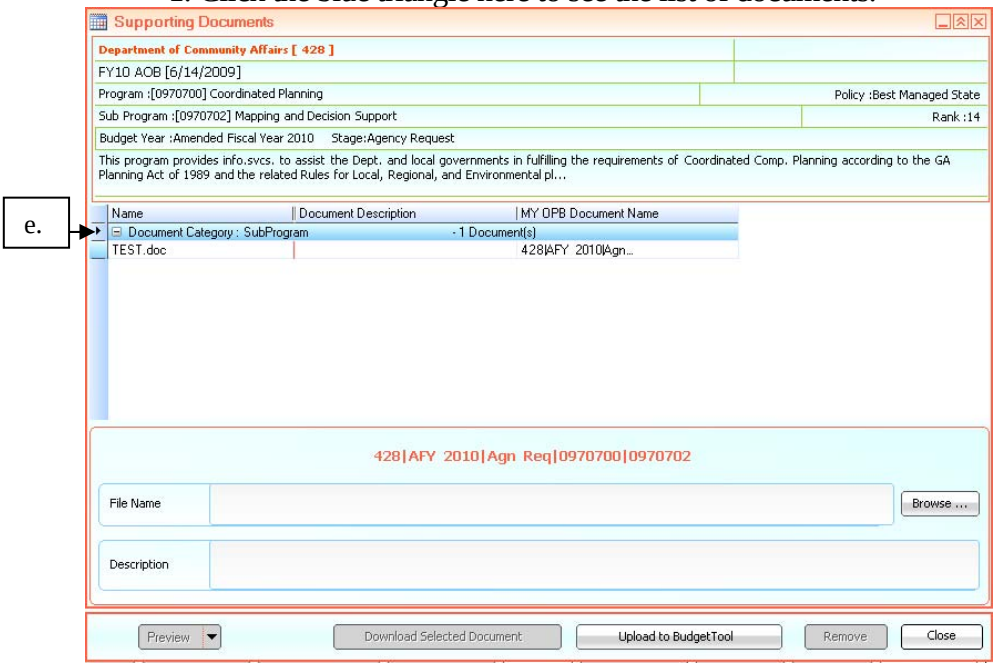
   Note you will not be able to upload the document until you have typed a description.
   c. Click the **Upload to BudgetTool** button



d. A dialog box confirms the upload; click **OK**

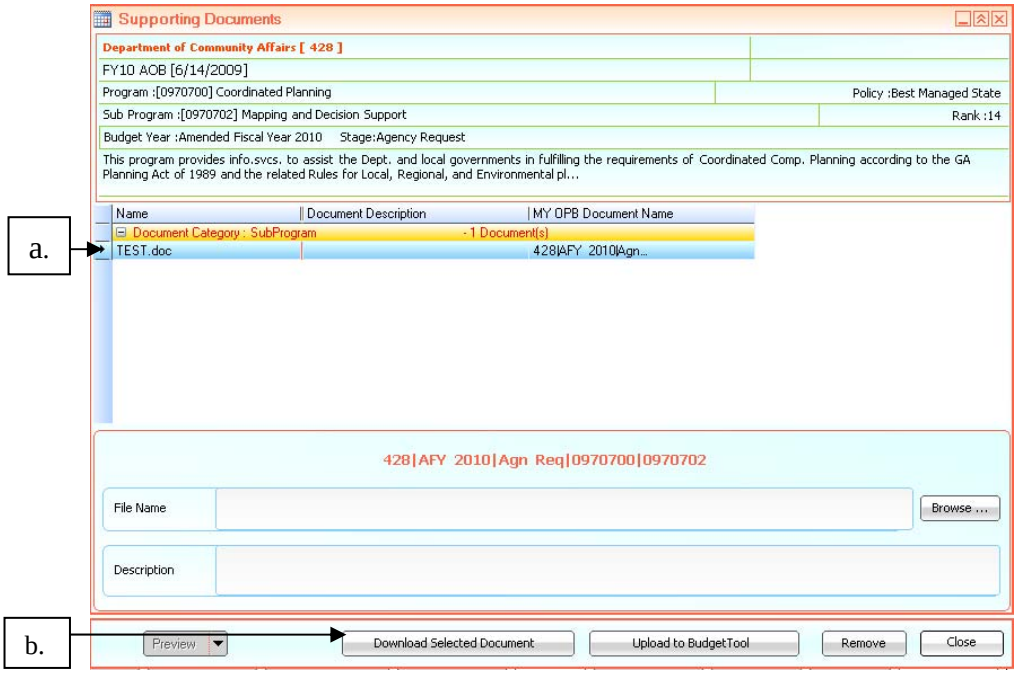


e. The document will now appear in the supporting document window.
1. Click the blue triangle here to see the list of documents.

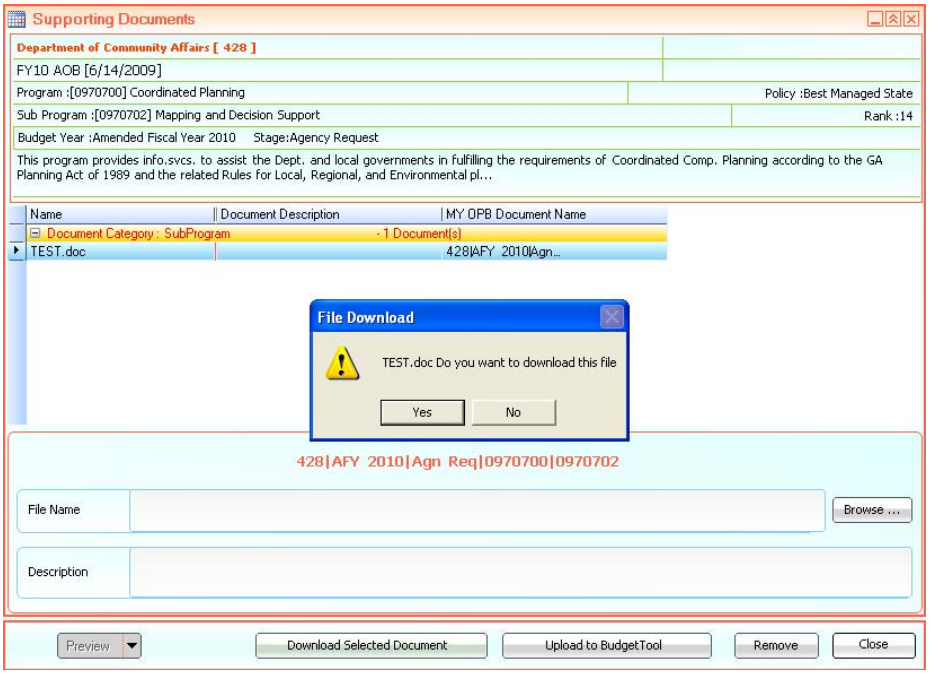

e.
Supporting Documents
Department of Community Affairs [428]
FY10 AOB [6/14/2009]
Program :[0970700] Coordinated Planning
Policy :Best Managed State
Sub Program :[0970702] Mapping and Decision Support
Rank :14
Budget Year :Amended Fiscal Year 2010 Stage:Agency Request
This program provides info.svcs. to assist the Dept. and local governments in fulfilling the requirements of Coordinated Comp. Planning according to the GA Planning Act of 1989 and the related Rules for Local, Regional, and Environmental pl...
Name
Document Description
MY OPB Document Name
Document Category : SubProgram
- 1 Document(s)
TEST.doc
428|AFY 2010|Agn...
428|AFY 2010|Agn Req|0970700|0970702
File Name
Browse ...
Description
Preview
Download Selected Document
Upload to BudgetTool
Remove
Close

B. Downloading Supporting Documents

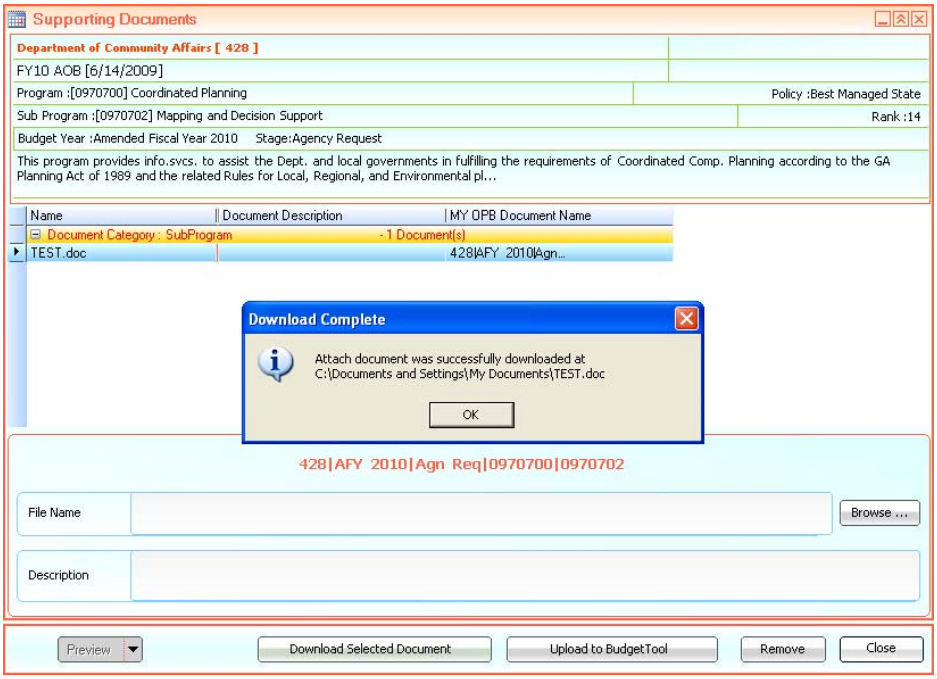
a. Highlight the document to be download to your computer
b. Click **Download Selected Documents** at the bottom of the Supporting Documents Screen



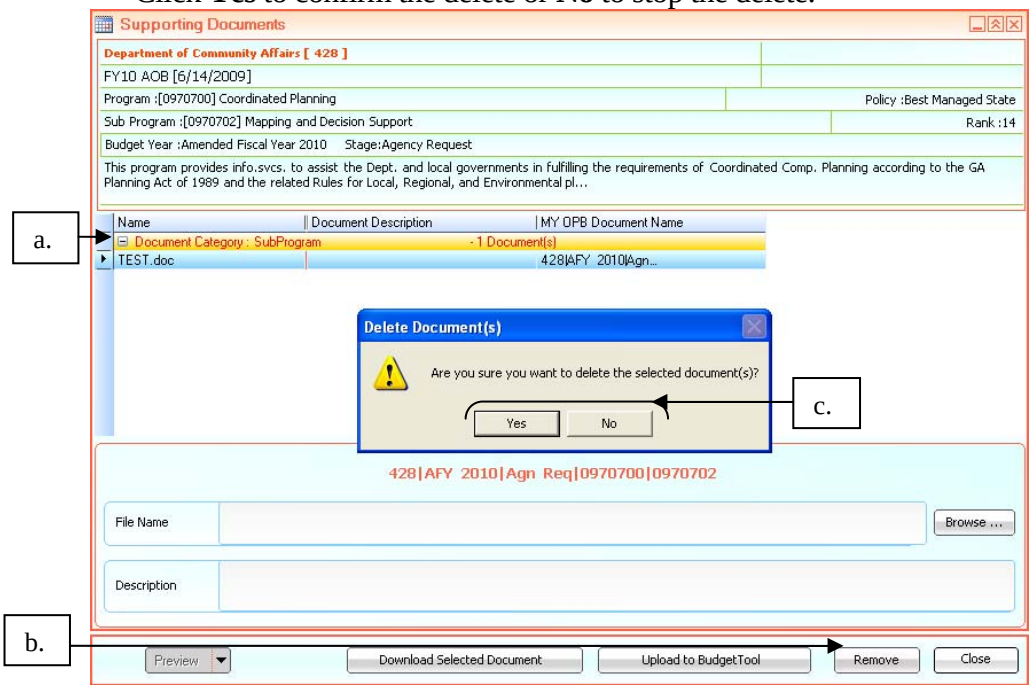
c. A dialog box will appear to confirm the download.
Click **Yes** to download the file**.**


Supporting Documents
Department of Community Affairs [428]
FY10 AOB [6/14/2009]
Program :[0970700] Coordinated Planning
Policy :Best Managed State
Sub Program :[0970702] Mapping and Decision Support
Rank :14
Budget Year :Amended Fiscal Year 2010
Stage:Agency Request
This program provides info.svcs. to assist the Dept. and local governments in fulfilling the requirements of Coordinated Comp. Planning according to the GA Planning Act of 1989 and the related Rules for Local, Regional, and Environmental pl...
Name
Document Description
MY OPB Document Name
Document Category : SubProgram
- 1 Document(s)
TEST.doc
428|AFY 2010|Agn...
File Download
TEST.doc Do you want to download this file
Yes
No
428|AFY 2010|Agn Req|0970700|0970702
File Name
Browse ...
Description
Preview
Download Selected Document
Upload to BudgetTool
Remove
Close

d. The Download Complete dialog confirms a successful download and indicates the location of the download.


Supporting Documents
Department of Community Affairs [428]
FY10 AOB [6/14/2009]
Program :[0970700] Coordinated Planning
Policy :Best Managed State
Sub Program :[0970702] Mapping and Decision Support
Rank :14
Budget Year :Amended Fiscal Year 2010 Stage:Agency Request
This program provides info.svcs. to assist the Dept. and local governments in fulfilling the requirements of Coordinated Comp. Planning according to the GA Planning Act of 1989 and the related Rules for Local, Regional, and Environmental pl...
Name
Document Description
MY OPB Document Name
Document Category : SubProgram
- 1 Document(s)
TEST.doc
428|AFY 2010|Agn...
Download Complete
Attach document was successfully downloaded at C:\Documents and Settings\My Documents\TEST.doc
OK
428|AFY 2010|Agn Req|0970700|0970702
File Name
Browse ...
Description
Preview
Download Selected Document
Upload to BudgetTool
Remove
Close

C. Deleting Documents from BudgetTool
   a. Highlight the document to be deleted.
   b. Click **Remove** at the bottom of the Supporting Documents Screen
   c. A dialog box confirms the document will be deleted
      Click **Yes** to confirm the delete or **No** to stop the delete.



Once an agency has produced the Adjusted Base (For FY2012 entered One Time Deletes, GAIT Outsourcing, and Exemptions) they can run the Agency Program Worksheet Summary report (report 100) which will calculate the required State General Funds reduction by Program/Sub-program. This report will show the agency Base (Cutoff Amendment) and all the base adjustments - One Time Deletes, GAIT Outsourcing, and Exemptions – and the adjusted base for State General Funds. It can be requested as an excel worksheet. Just make note of the total and then move the reductions to the desired programs, change the amounts, etc. so long as the total equals the required percentage amount of State General Funds. Once the amounts are determined by program/sub-program the agency can next enter their Reduction change types.

Reports

A. Click the **Reports** Shield

A. Selection of Custom Reports.

Currently there are 41 custom reports in BudgetTool. Many these reports can be run, and customized according to the user's individual needs. However, some reports have been pre-customized and cannot be changed by the user. These have '.1c, 2.c, etc.' after the basic report number and are a modification of that basic report. All reports can be output in various formats – PDF, Excel, HTML, etc. The following reports are available:

100 – Program Summary
100.1c – AOB Agency Summary Amendment Analysis
110 – Program Summary
200 – Fund Changes by Entry
200.1c - Fund Change Entries by Change Type (All Funds)
210 – Fund Summary Changes by Entry
300 - State General Funds Base Adjustment
400 - State General Funds Request
400.1c – State General Funds 4% Request
400.2c – State General Funds 6% Request
400.3c – State General Funds 8% Request
500 – All Funds Request
510 – Summary Request by Scenario
510.1c – Summary 4% Request by Scenario
510.2c – Summary 6% Request by Scenario
510.3c – Summary 8% Request by Scenario
510.4c – Summary Request All Agencies (Excel)
550 – Agency Level Program(s) Detail Summary View
550.1c – Object Class/Fund Source Detail Report 4% Request (Single Agency)
550.2c – Object Class/Fund Source Detail Report 6% Request (Single Agency)
550.3c – Object Class/Fund Source Detail Report 8% Request (Single Agency)
600 – Stage Submission Status
600.1c – Budget Submission Status - Agency Request
600.2c – Budget Submission Status (All Stages)
700 – Recommendation
700.1c – OPB Recommendation (legal paper)
700.2c – OPB Recommendation w/ group descriptions
800 – Budget Details
900 – Performance Measures
910 – Performance Measures Multi Agency
940 – Program Purpose
940.1c – Program Purpose
950 – Program Recommendations
950.1c – Governor's Book Pages
955 – Program Historical Summary
958 – Agency Counts Summary
960 – Program Fund Source Summary
960.1c – Program Fund Source Summary
965 – Agency Statewide Changes Summary

970 – Agency Fund Source Summary
970.1c – Agency Fund Source Summary

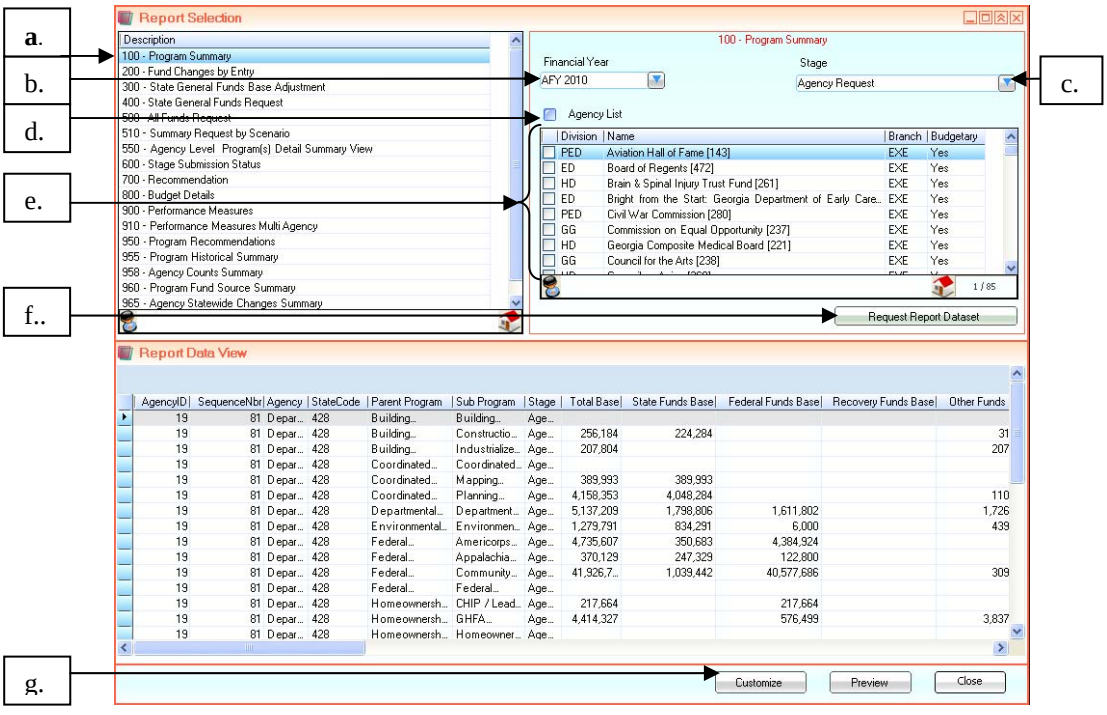
1) Running a Custom Report

a. Highlight the report you want to run
b. Select the **Financial Year** from the Drop Down Box
c. Select the **Stage**
d. **Agency List** – Check here <u>to select all the agencies</u> at once if you have more than one agency in the list
e. To select one or more agencies individually, check the box to the left of the Agency name

The agency list box has four fields:

Division – this is the OPB division to which the agency is assigned
Name – name of the Agency
Branch – the branch of government to which the agency belongs
Budgetary – Yes or No (Yes means it is an appropriated agency that will appear in the appropriations bill)

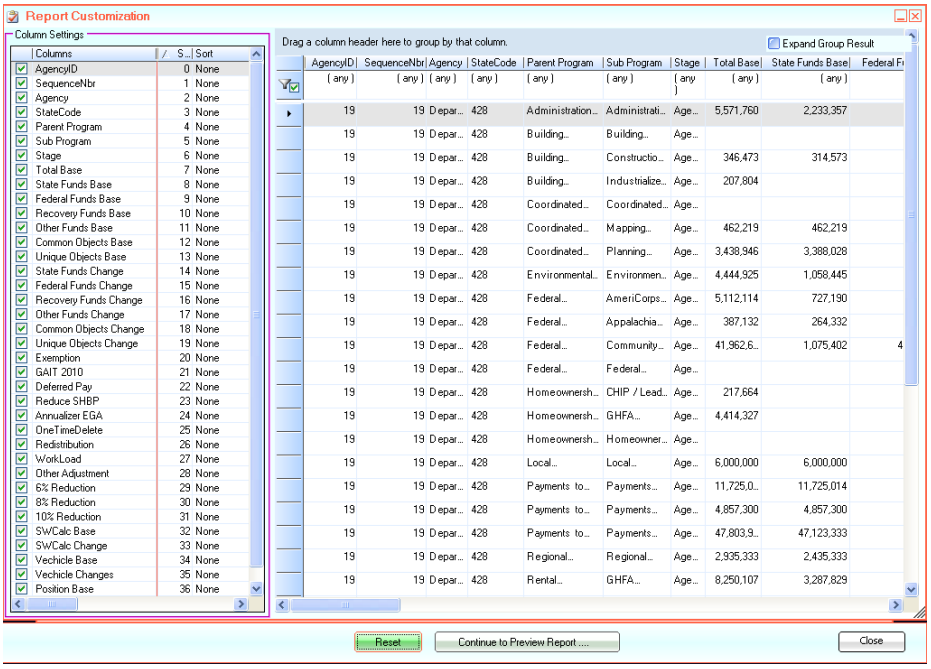
f. Click **Request Report Dataset**
g. Click **Customize** if you need to customize the report


a.
b.
d.
e.
f..
g.
c.
Report Selection
Description
100 - Program Summary
200 - Fund Changes by Entry
300 - State General Funds Base Adjustment
400 - State General Funds Request
500 - All Funds Request
510 - Summary Request by Scenario
550 - Agency Level Program(s) Detail Summary View
600 - Stage Submission Status
700 - Recommendation
800 - Budget Details
900 - Performance Measures
910 - Performance Measures Multi Agency
950 - Program Recommendations
955 - Program Historical Summary
958 - Agency Counts Summary
960 - Program Fund Source Summary
965 - Agency Statewide Changes Summary
100 - Program Summary
Financial Year
AFY 2010
Stage
Agency Request
Agency List
Division | Name | Branch | Budgetary
PED Aviation Hall of Fame [143] EXE Yes
ED Board of Regents [472] EXE Yes
HD Brain & Spinal Injury Trust Fund [261] EXE Yes
ED Bright from the Start: Georgia Department of Early Care.. EXE Yes
PED Civil War Commission [280] EXE Yes
GG Commission on Equal Opportunity [237] EXE Yes
HD Georgia Composite Medical Board [221] EXE Yes
GG Council for the Arts [238] EXE Yes
1 / 85
Request Report Dataset
Report Data View
AgencyID | SequenceNbr | Agency | StateCode | Parent Program | Sub Program | Stage | Total Base | State Funds Base | Federal Funds Base | Recovery Funds Base | Other Funds
19 81 Depar... 428 Building... Building... Age...
19 81 Depar... 428 Building... Constructio... Age... 256,184 224,284 31
19 81 Depar... 428 Building... Industrialize... Age... 207,804 207
19 81 Depar... 428 Coordinated... Coordinated... Age...
19 81 Depar... 428 Coordinated... Mapping... Age... 389,993 389,993
19 81 Depar... 428 Coordinated... Planning... Age... 4,158,353 4,048,284 110
19 81 Depar... 428 Departmental... Department... Age... 5,137,209 1,798,806 1,611,802 1,726
19 81 Depar... 428 Environmental... Environmen... Age... 1,279,791 834,291 6,000 439
19 81 Depar... 428 Federal... Americorps... Age... 4,735,607 350,683 4,384,924
19 81 Depar... 428 Federal... Appalachia... Age... 370,129 247,329 122,800
19 81 Depar... 428 Federal... Community... Age... 41,926,7... 1,039,442 40,577,686 309
19 81 Depar... 428 Federal... Federal... Age...
19 81 Depar... 428 Homeownersh... CHIP / Lead... Age... 217,664 217,664
19 81 Depar... 428 Homeownersh... GHFA... Age... 4,414,327 576,499 3,837
19 81 Depar... 428 Homeownersh... Homeowner... Age...
Customize
Preview
Close

2) Customizing the Reports

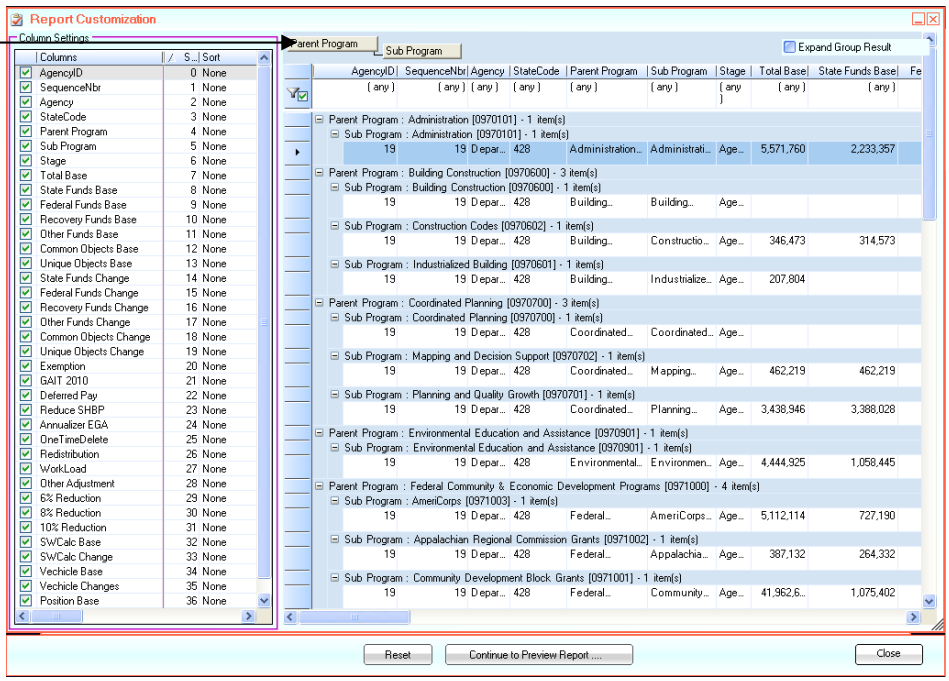
a. Changing the grouping

1 .Click **Continue to Preview Report**



1.

2. Drag a Column Header to the space above the headers to group by that column header

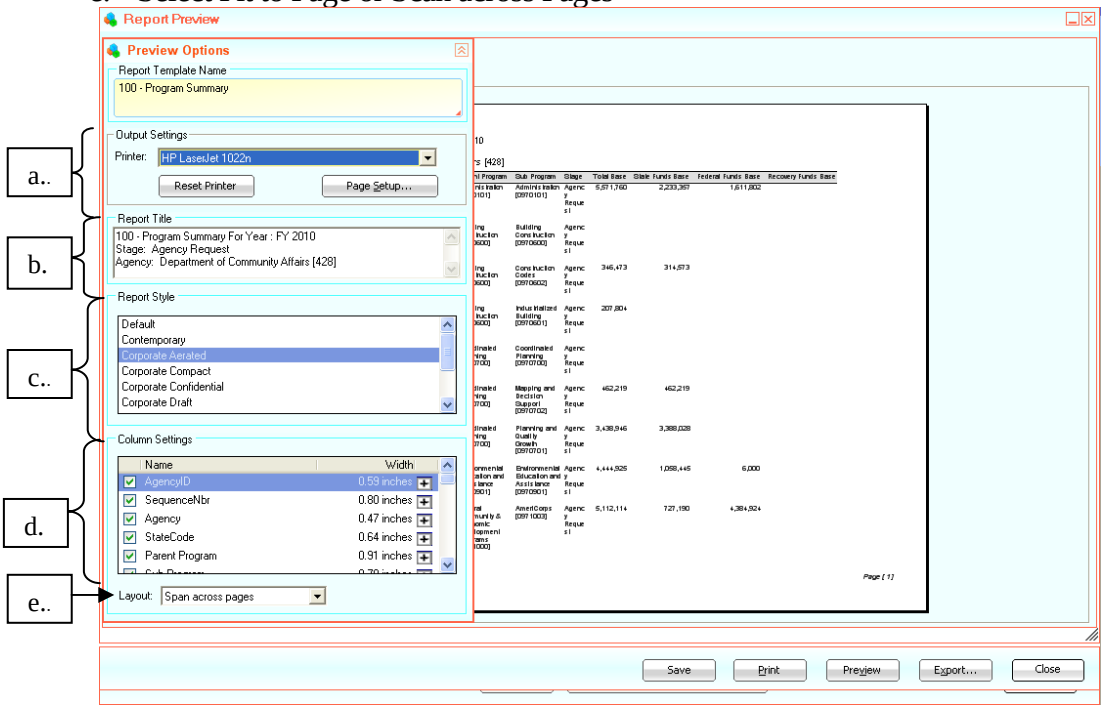


2.

3) Report Preview and Customization

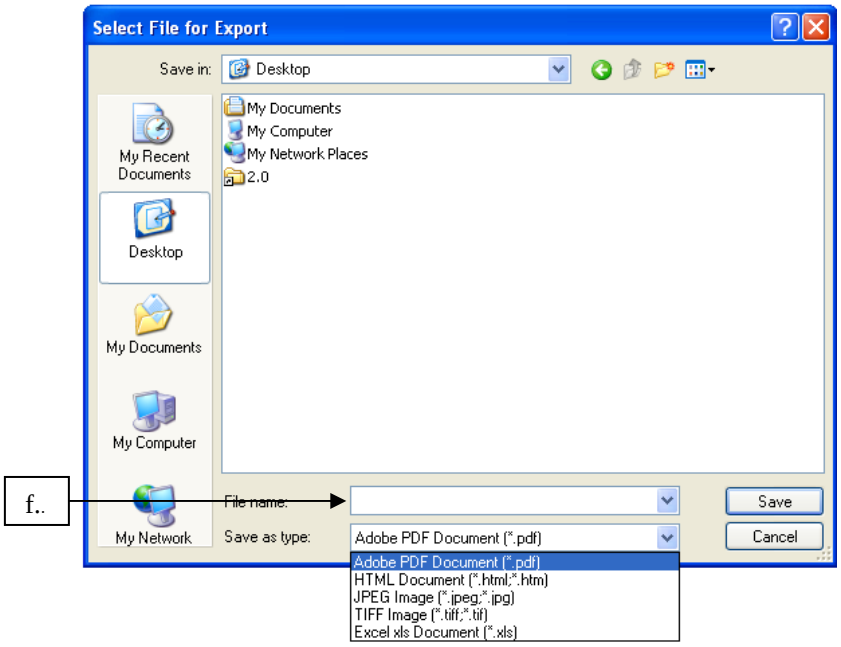
Many screens in BudgetTool allow the user to Preview, Print and/or Export a report to a file. The user would click Preview to see this screen

a. Select a Printer and use Page Setup to change margins
b. Report Title
c. Select a Report Style
d. Uncheck any columns you will not need
e. Select Fit to Page or Scan across Pages



The document can then be printed or exported.

f. Type in the file name and Select the Save location



Review Prior to Submission

Redistributions

Agencies can move funds among programs to fund those initiatives they feel are critical to their operations. The net of redistributions by fund source must total zero for an agency. If these do not equal zero the submit process will be blocked.

Workload

Workload adjustments for state general funds are permitted for programs that are enrollment based. These pertain only to Department of Education. Federal, Recovery Funds and Other Funds can be added or deleted using workload adjustment change types

Budget Request Check

Agencies can check their total budget request by running the Agency Request State General Funds report. This report shows the Adjusted Base less Reductions, plus Redistributions, plus Workload Adjustments, plus Exemptions, plus GTA Outsourcing which equals the Agency Request for State General Funds. See the above section Reports for instruction on how to run the report.

Agency Request = Adjusted Base – % Reductions + or - Redistributions + Exemptions + GTA Outsourcing + or - Workloads = Agency Request

Pre-check

An agency can run a pre-check at any time. A pre-check makes certain that entries have the right sign – positive or negative – for the entry type, that fund source and object class changes are in balance, that detail amounts equal the summary amounts, and for Executive Branch agencies that the state general funds reduction percentages are met or exceeded. The pre-check works as follows:

Submit Validation Process

The submit validation process for the Agency Requests datasets is comprised of 5 levels. The validation process runs one level at a time meaning if at a given level an error(s) is(are) found the validation process stops, returns the error list to the user, and does not go onto the next level. You must then correct those issues and run the validation process again to proceed to find if there are any errors beyond what was previously identified.

Level 1: The first level of validation checks is on the following:

1.1 All one time delete entries must be negative
1.2 All Exemptions entries must be negative
1.3 All GTA Outsourcing entries must be negative
1.4 The sum of Redistributions must equal 0 at the agency level by individual Fund Source.

For items 1.1, 1.2, and 1.3 the errors will be written to the screen in a table with 4 columns, the first showing the Program/Sub-Program, the second the Type (fund source, count, object class), the third Name, and the fourth the Amount. Item 1.4 will display the list of Fund Sources that do not net to zero for redistributions for the agency.

Level 2: 4, 6, and 8% Reductions AFY2011 and 6, 8, and 10% Reductions FY2012

The percent reduction validation process verifies that the sum of reductions is at least the required percentage of the adjusted base. This validation is on State General Funds only in total for the agency. **There can be redirects on any fund source and object class but the validation checks against State General Funds only**.

NOTE: This specific check does not apply to Agencies in the Legislative and Judicial branches of Government. In addition, the Department of Education will be submitting reduction plans for QBE, Equalization, and State Schools, therefore this validation will not be performed. For Amended FY 2011 the reduction is 2% and for FY 2012 the reduction is 4%.

Level 3: Total Funds = Total Object Class Expenditures

By sub-program/single program validation process returns the discrepancies between Total Funds and Total Object Class Expenditures.

Level 4: Federal Funds/Recovery Funds/Other Funds to detail check

4.1 The Federal Fund Source Amount = Sum of Federal Fund Details amounts
4.2 The Federal Recovery Funds Amount = Sum of Recovery Funds Detail amounts
4.3 The Other Fund Source Amount = Sum of Other Fund Details Amounts
4.4 Personal Services Amount = Sum of PS 300 Detail Amounts

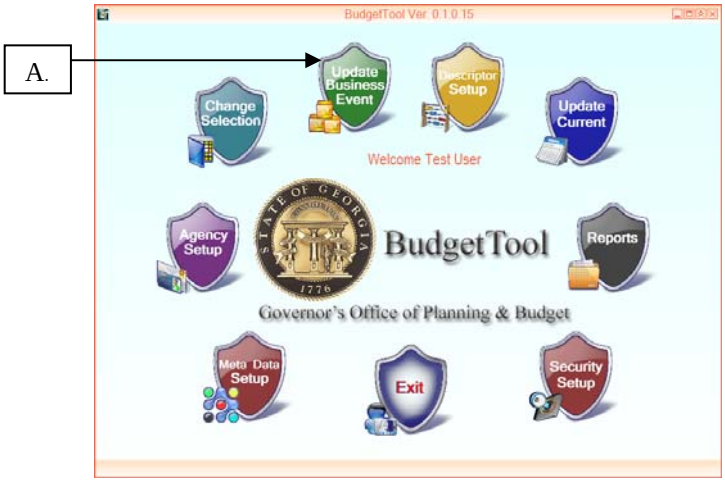
Level 5: Negative Funds Warning

If the result of Base + change amounts for a fund source is negative at the program/sub-program then the validation process returns a warning but does not prevent submission.

Note: Some agencies have programs with negative fund sources.

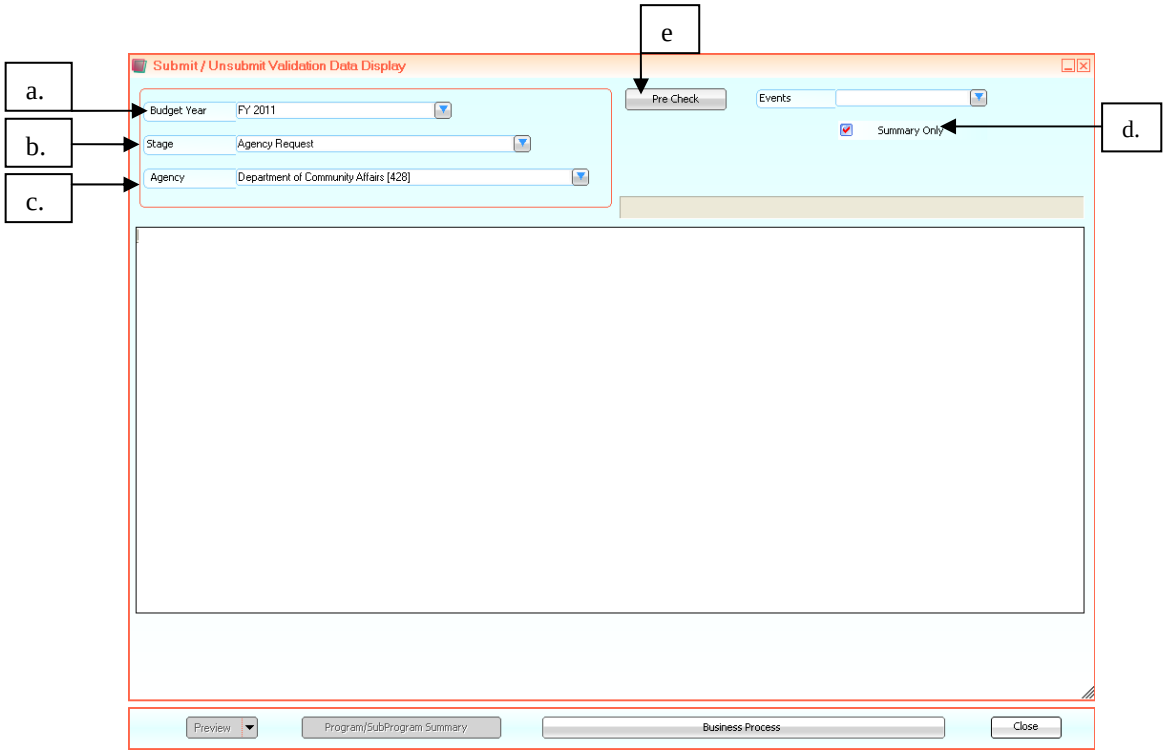
Pre-checks and Submit

A. Click the **Update Business Event** Shield

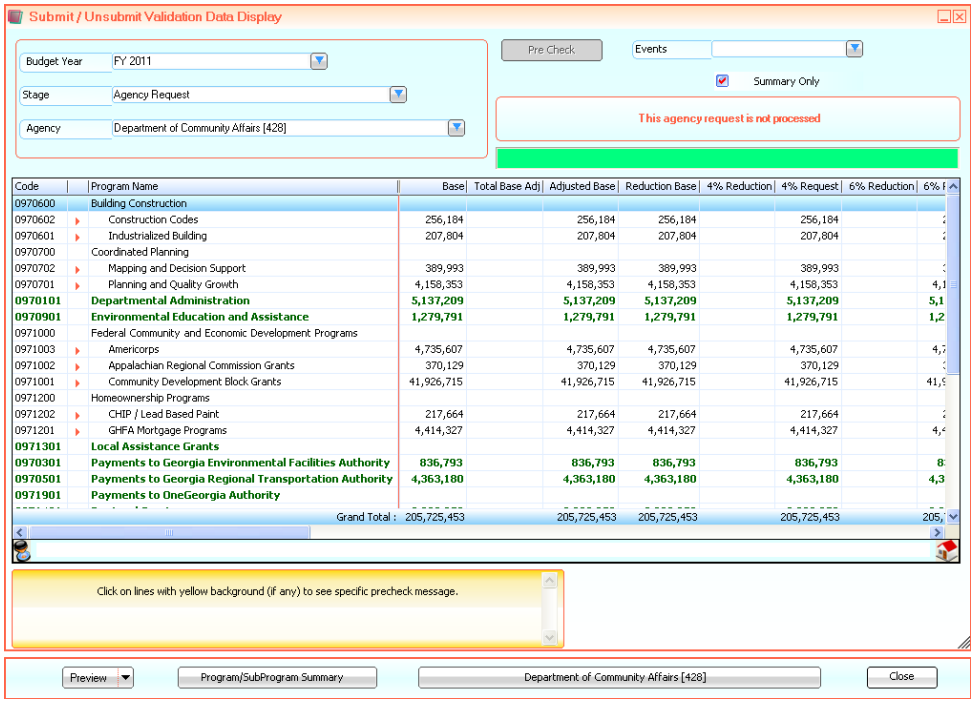


B. Submit/Un-submit Validation Data Display Screen
   a. Select Budget Year
   b. Select Stage
   c. Select Agency
   d. Select Summary
   e. Click Pre Check

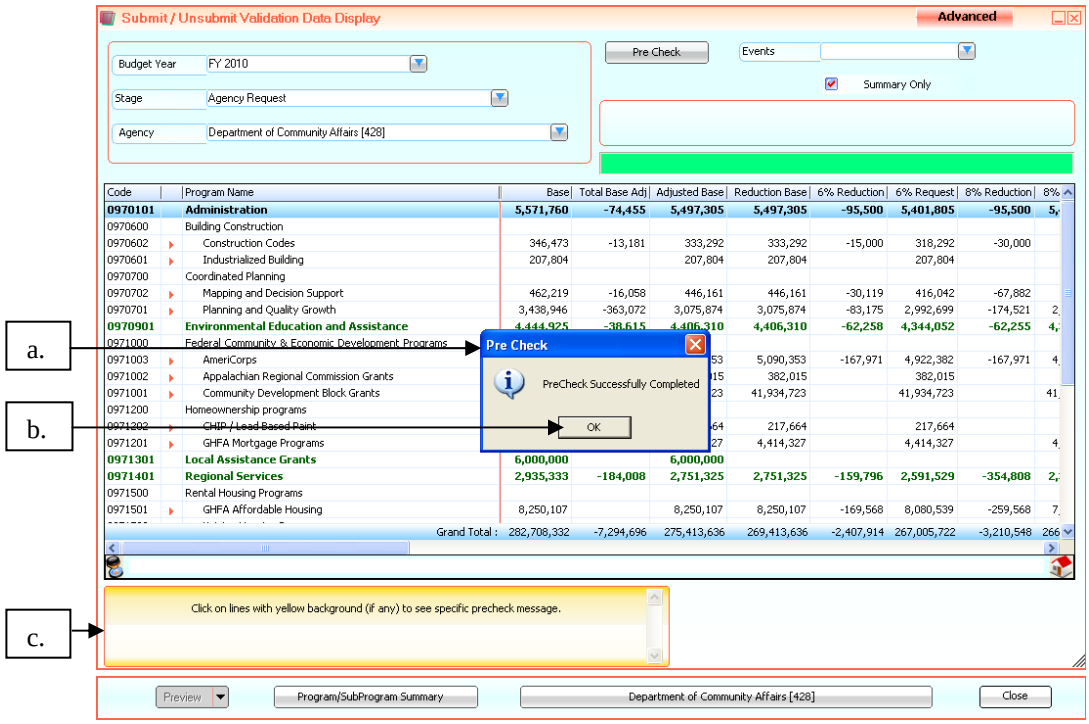
   Summary Only – Clicking here reduces the number of columns to Total Funds, Total Objects, Adjusted Base, Agency Request, and Parent Program Name



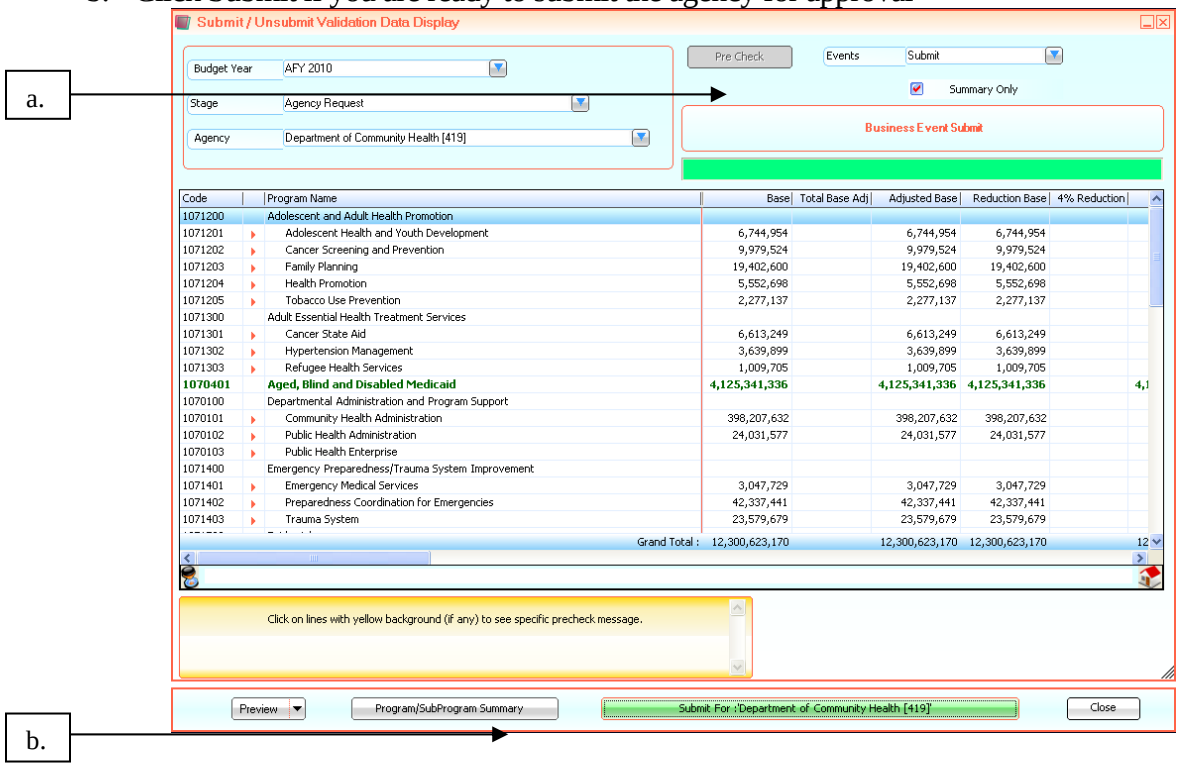
C. Pre Check ***Summary Only***


Submit / Unsubmit Validation Data Display
Budget Year
FY 2011
Stage
Agency Request
Agency
Department of Community Affairs [428]
Pre Check
Events
Summary Only
This agency request is not processed
Code
Program Name
Base
Total Base Adj
Adjusted Base
Reduction Base
4% Reduction
4% Request
6% Reduction
0970600 Building Construction
0970602 Construction Codes 256,184 256,184 256,184 256,184
0970601 Industrialized Building 207,804 207,804 207,804 207,804
0970700 Coordinated Planning
0970702 Mapping and Decision Support 389,993 389,993 389,993 389,993
0970701 Planning and Quality Growth 4,158,353 4,158,353 4,158,353 4,158,353
0970101 Departmental Administration 5,137,209 5,137,209 5,137,209 5,137,209
0970901 Environmental Education and Assistance 1,279,791 1,279,791 1,279,791 1,279,791
0971000 Federal Community and Economic Development Programs
0971003 Americorps 4,735,607 4,735,607 4,735,607 4,735,607
0971002 Appalachian Regional Commission Grants 370,129 370,129 370,129 370,129
0971001 Community Development Block Grants 41,926,715 41,926,715 41,926,715 41,926,715
0971200 Homeownership Programs
0971202 CHIP / Lead Based Paint 217,664 217,664 217,664 217,664
0971201 GHFA Mortgage Programs 4,414,327 4,414,327 4,414,327 4,414,327
0971301 Local Assistance Grants
0970301 Payments to Georgia Environmental Facilities Authority 836,793 836,793 836,793 836,793
0970501 Payments to Georgia Regional Transportation Authority 4,363,180 4,363,180 4,363,180 4,363,180
0971901 Payments to OneGeorgia Authority
Grand Total : 205,725,453 205,725,453 205,725,453 205,725,453
Click on lines with yellow background (if any) to see specific precheck message.
Preview
Program/SubProgram Summary
Department of Community Affairs [428]
Close

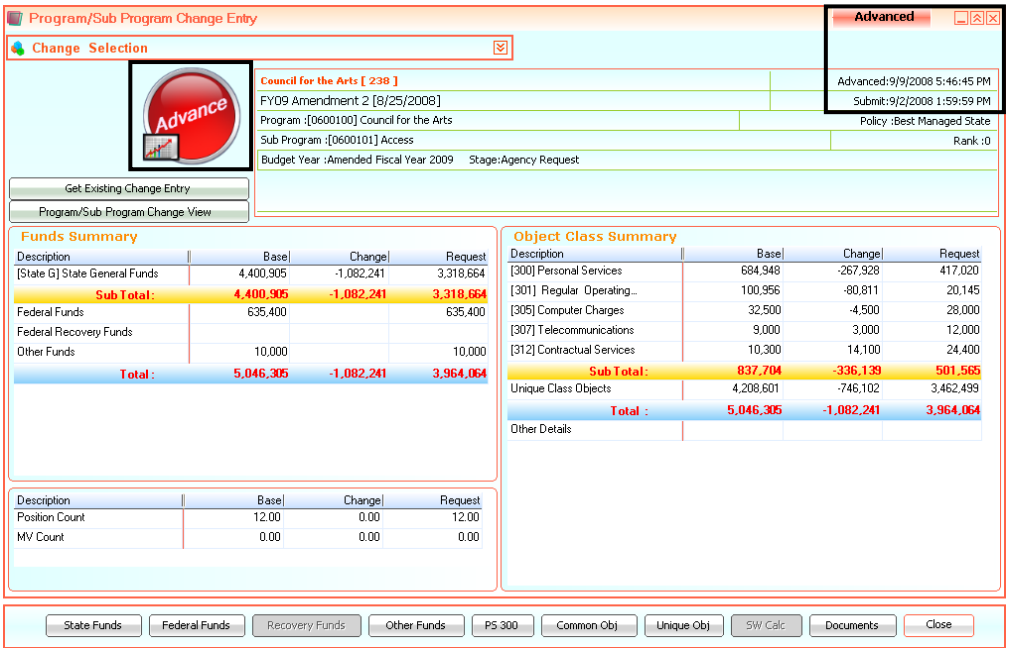
D. Successful Pre-check
   a. A dialog box will indicate a successful Pre Check
   b. Click OK in the Pre Check dialog box
   c. Items which could prevent a successful Pre Check will be highlighted in yellow.


Submit / Unsubmit Validation Data Display
Advanced
Budget Year
FY 2010
Stage
Agency Request
Agency
Department of Community Affairs [428]
Pre Check
Events
Summary Only
Code
Program Name
Base
Total Base Adj
Adjusted Base
Reduction Base
6% Reduction
6% Request
8% Reduction
0970101 Administration 5,571,760 -74,455 5,497,305 5,497,305 -95,500 5,401,805 -95,500
0970600 Building Construction
0970602 Construction Codes 346,473 -13,181 333,292 333,292 -15,000 318,292 -30,000
0970601 Industrialized Building 207,804 207,804 207,804 207,804
0970700 Coordinated Planning
0970702 Mapping and Decision Support 462,219 -16,058 446,161 446,161 -30,119 416,042 -67,882
0970701 Planning and Quality Growth 3,438,946 -363,072 3,075,874 3,075,874 -83,175 2,992,699 -174,521
0970901 Environmental Education and Assistance 4,444,925 -38,615 4,406,310 4,406,310 -62,258 4,344,052 -62,255
0971000 Federal Community & Economic Development Programs
0971003 AmeriCorps 5,090,353 -167,971 4,922,382 -167,971
0971002 Appalachian Regional Commission Grants 382,015 382,015
0971001 Community Development Block Grants 41,934,723 41,934,723
0971200 Homeownership programs
0971202 CHIP / Lead Based Paint 217,664 217,664
0971201 GHFA Mortgage Programs 4,414,327 4,414,327
0971301 Local Assistance Grants 6,000,000 6,000,000
0971401 Regional Services 2,935,333 -184,008 2,751,325 2,751,325 -159,796 2,591,529 -354,808
0971500 Rental Housing Programs
0971501 GHFA Affordable Housing 8,250,107 8,250,107 8,250,107 -169,568 8,080,539 -259,568
Grand Total : 282,708,332 -7,294,696 275,413,636 269,413,636 -2,407,914 267,005,722 -3,210,548
Pre Check
PreCheck Successfully Completed
OK
a.
b.
c.
Click on lines with yellow background (if any) to see specific precheck message.
Preview
Program/SubProgram Summary
Department of Community Affairs [428]
Close

E. Successful Pre-check with a negative funds warning
   a. Select the Event using the drop down button
   b. Click Submit if you are ready to submit the agency for approval


a.
b.
Submit / Unsubmit Validation Data Display
Budget Year
AFY 2010
Stage
Agency Request
Agency
Department of Community Health [419]
Pre Check
Events
Submit
Summary Only
Business Event Submit
Code
Program Name
Base
Total Base Adj
Adjusted Base
Reduction Base
4% Reduction
1071200 Adolescent and Adult Health Promotion
1071201 Adolescent Health and Youth Development 6,744,954 6,744,954 6,744,954
1071202 Cancer Screening and Prevention 9,979,524 9,979,524 9,979,524
1071203 Family Planning 19,402,600 19,402,600 19,402,600
1071204 Health Promotion 5,552,698 5,552,698 5,552,698
1071205 Tobacco Use Prevention 2,277,137 2,277,137 2,277,137
1071300 Adult Essential Health Treatment Services
1071301 Cancer State Aid 6,613,249 6,613,249 6,613,249
1071302 Hypertension Management 3,639,899 3,639,899 3,639,899
1071303 Refugee Health Services 1,009,705 1,009,705 1,009,705
1070401 Aged, Blind and Disabled Medicaid 4,125,341,336 4,125,341,336 4,125,341,336
1070100 Departmental Administration and Program Support
1070101 Community Health Administration 398,207,632 398,207,632 398,207,632
1070102 Public Health Administration 24,031,577 24,031,577 24,031,577
1070103 Public Health Enterprise
1071400 Emergency Preparedness/Trauma System Improvement
1071401 Emergency Medical Services 3,047,729 3,047,729 3,047,729
1071402 Preparedness Coordination for Emergencies 42,337,441 42,337,441 42,337,441
1071403 Trauma System 23,579,679 23,579,679 23,579,679
Grand Total : 12,300,623,170 12,300,623,170 12,300,623,170
Click on lines with yellow background (if any) to see specific precheck message.
Preview
Program/SubProgram Summary
Submit For :'Department of Community Health [419]'
Close

The Agency Program/Sub-Program Summary Screen will now have symbols indicating the Agency has been Submitted or Advanced and the dates.



Agency Submit

When an agency submits their budget request to OPB (See above instructions) an email notifies both the agency and OPB and the data can no longer be changed. OPB can do two things with the agency's submission: 1. Un-submit it – that is send it back to the agency for additional detail, changes, etc. in which case the agency receives an email and can work in that stage again; or 2. Advance the data to the OPB Recommendation stage in which case an email is also sent to the agency but no further changes can be made to the agency request.

Section III. B: OPB Budget Development

OPB Analysts will follow the same procedures and processes as detailed above for the agency analysts to enter descriptors and make changes to the Agency Request to develop an OPB Recommendation. (See above Section - Agency Request) In addition, the OPB analyst may select from the 4, 6, and 8% reductions for Amended FY 2011 or the 6, 8, and 10% reductions for FY 2012 as part of their recommendation. Since the Governor's Budget Report is at the Parent Program level, the OPB analysts will spend a great deal of effort grouping many of the sub-program descriptors.

Once the Agency Request is advanced to the OPB Recommendation no changes can be made to the original agency request. The OPB analyst can change amounts, and enter new standard or agencywide descriptors. No descriptors originating in the agency request can be deleted. They can be zeroed out however. The OPB analyst will use BudgetTool in the same manner as the Agency Analyst to develop the OPB Recommendation. However, most of the OPB Analysts' work will be editing, changing, or clarifying the agency request. The OPB Recommendation stage is where the budget request is developed into a recommendation to the Governor.

The OPB analyst with the submit role can submit an OPB Recommendation at which time the data can no longer be changed. The OPB Division Director can either unsubmit the request or advance it to the Governor's Initial stage. No email notifications are generated in the stages after the Agency Request.

The Governor's Initial stage is the 'Working' stage for the Governor. Here further changes are made at the direction of the Governor and/or his staff. The OPB Division Director can submit the Governors Initial. The OPB Executive User can either unsubmit it or advance it to the Governors Final stage.

Section III. C: Executive Budget Recommendation

The executive user is the only user that can advance the Governors Initial to the Governors Final stage.

Once the data is in the Governor's Final stage no changes can be made.